

To: Karen Churchard, Tourism and Events Director
Steve Geiogamah, Tourism Development Manager
From: Paul Basha, Transportation Director
Subject: Downtown Trolley Ridership
Date: 9 November 2016



Introduction:

Per request of the Tourism Development Commission, the Transportation Department monitored the Downtown Trolley ridership. The Tourism Development Commission wished to ensure the hotel bed tax expenditure on the Downtown Trolley was justified by dominant tourist use of the Downtown Trolley.

Summary of Information:

The Downtown Trolley ridership has increased by 23% in the twelve months with 10-minute frequency compared to the previous twelve months with 15-minute frequency.

A survey of 793 Downtown Riders conducted in 40 different time periods from February through July revealed that:

- 7% of riders are from outside North America
- 16% are from Canada
- 42% are from the United States, outside of Arizona
- 11% are from Arizona, outside of Scottsdale
- 24% are Scottsdale residents.

- 92% of riders are using the Downtown Trolley for Sightseeing, Shopping, or Dining
- 7% are using the Downtown Trolley for Work
- 0% are using the Downtown Trolley for School
- 2% are using the Downtown Trolley for Other purposes

The top five origins or destinations of Downtown Trolley riders are: Fashion Square, Unsure, Main Street, Old Town, and Museum of the West.

The top five sources for learning about the Downtown Trolley are: Word-of-Mouth, Street Signs, Hotel, Website, and Saw Trolley.

The estimated cost-per-tourist-rider for the Day Tripper was \$18.10 and the estimated cost-per-tourist-rider for the Downtown Trolley is \$2.11.

At the 17 March 2015 Tourism Development Commission meeting, the Transportation Department suggested the following three criteria for determining if the Downtown Trolley should qualify for hotel bed tax revenue:

1. Ridership exceed 700 per day.
2. Portion of trolley riders staying in Scottsdale hotel exceeds 60%.
3. Cost-per-rider is less than citywide bus and trolley average cost-per-rider.

The maximum average Downtown Trolley ridership of 542 per day is less than 700 per day.
The portion of Downtown Trolley riders staying in metropolitan Phoenix hotels of 34% is less than 60%.
The Downtown Trolley cost-per-rider of \$3.02 in fiscal year 2015-2016 is less than the Citywide bus and trolley average of \$3.56 in fiscal year 2014-2015.

While the portion of Downtown Trolley riders staying in Scottsdale hotels is substantially less than 60%, the portion of Downtown Trolley ridership from residents outside of Scottsdale is 89% and the portion of riders sightseeing, shopping, and dining is 92%.

While the Downtown Trolley cost-per-rider of \$3.02 in fiscal year 2015-2016 is less than the Citywide bus and trolley cost, it is more than the average of the other three trolleys of \$2.56 in fiscal year 2015-2016.

Day-Tripper Ridership:

The Day Tripper (also identified as the Hospitality Trolley or the Scottsdale Road Hotel Trolley) operated from late December through late March for five seasons. The Day Tripper was entirely funded by the hotel bed tax. For the 2014-2015 season, the trolleys operated with 100% increase in service frequency and 50% budget increase compared to the 2013-2014 season. The total ridership increased by 14% and the average daily ridership increased by 10% compared to the 2013-2014 season. The table below provides the average daily ridership by season for the 5 years the service operated.

<u>SEASON</u>	<u>TOTAL RIDERS</u>	<u>AVERAGE DAILY RIDERS</u>
2010-2011	10,941	140
2011-2012	17,079	177
2012-2013	16,695	184
2013-2014	19,612	209
2014-2015	22,419	230

The Tourism and Events Department contracted with Behavior Research Center to survey Day Tripper riders during January, February, and March of 2015. The surveys were conducted on Monday, Wednesday, Friday, or Saturday from either noon to 4:00 PM or 4:00 to 8:00 PM; and 148 riders were surveyed. This survey discovered that 54% of the riders were from outside of the Phoenix metropolitan area, and 46% of the riders lived in the Phoenix metropolitan area. Regarding trip purpose, the survey discovered that 75% of the riders were using the Day Tripper as tourists, and 25% of the riders were using the Day Tripper for work commute.

Therefore, the Day Tripper, on a daily basis, was serving an estimated 172 tourists (75% of 230), and 58 local workers (25% of 230).

The data shows that Day Tripper total and daily ridership increased every year. However, the daily ridership remained very low compared to other Scottsdale trolleys, and was magnified by a relatively high non-tourist ridership. Therefore, at the 14 April 2015 City Council meeting, the Council voted 6-1 to discontinue the Day Tripper and re-allocate the \$300,000 that was expended on the Day Tripper for the 2014-2015 season to the Downtown Trolley. Beginning late October 2015, the City of Scottsdale began using hotel bed tax to fund a portion of the Downtown Trolley operating cost. This additional funding allowed the Downtown Trolley to increase its frequency from 15 minutes to 10 minutes. The Downtown Trolley operated with 10-minute frequency prior to the 2009 / 2010 Fiscal Year. Due to limited funding, the Downtown Trolley operated at 15-minute frequency for Fiscal Years 2009 / 2010 through 2014 / 2015.

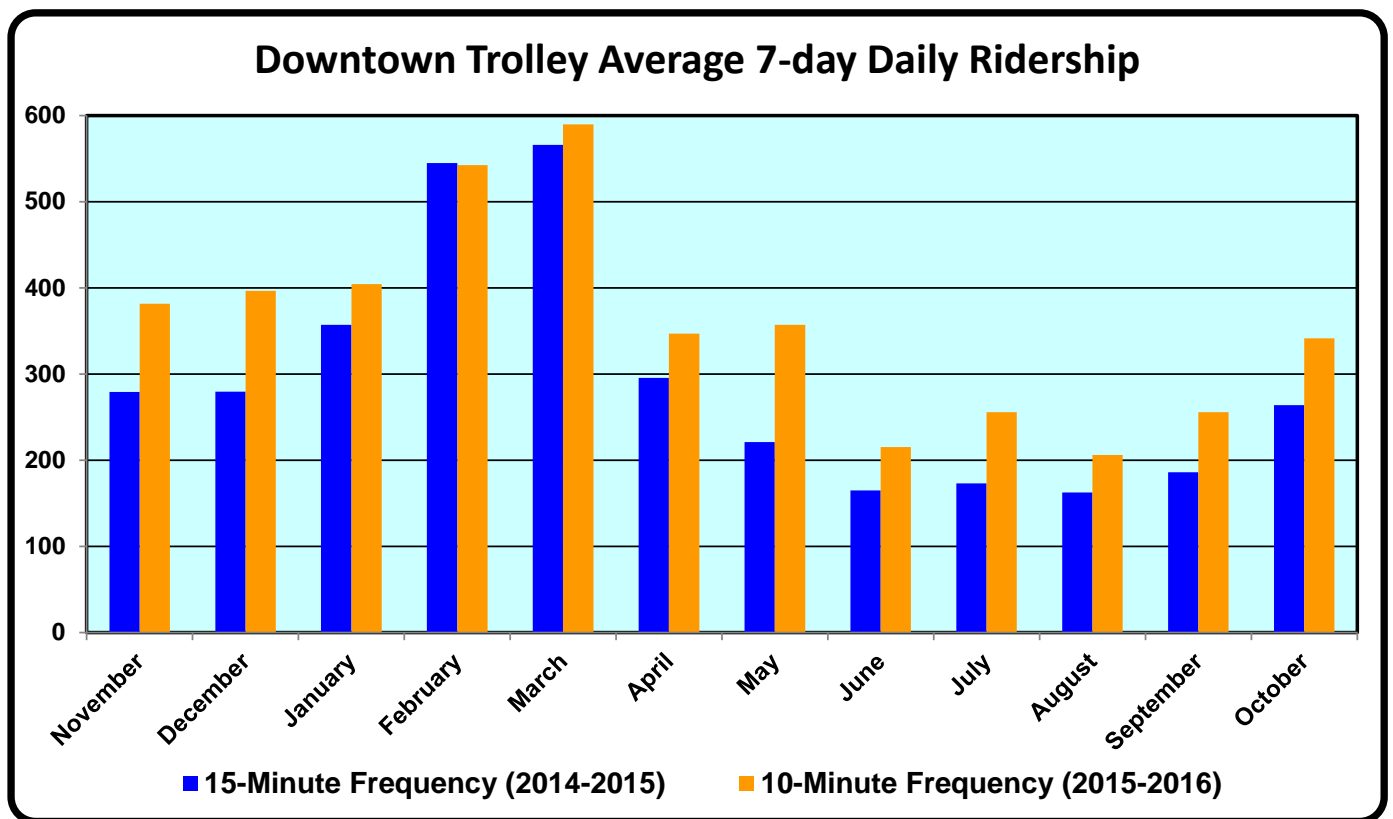
Downtown-Trolley Ridership:

To understand the impact of the frequency change, the first twelve months of the 10-minute frequency ridership was compared to the same twelve months of 15-minute frequency ridership in the previous year. The tables below and on the following page summarize this ridership comparison. These data are for all seven days of the week.

<u>MONTH</u>	<u>TOTAL</u>	<u>AVERAGE 7-DAY DAILY RIDERS FOR MONTH</u>
November 2014	8,090	279
December 2014	8,397	280
January 2015	10,724	357
February 2015	15,256	545
March 2015	17,533	566
April 2015	8,872	295
May 2015	6,618	221
June 2015	4,941	165
July 2015	5,024	173
August 2015	5,040	163
September 2015	5,583	186
October 2015	8,188	264
Twelve-month Total	104,266	291

MONTH	TOTAL	AVERAGE 7-DAY DAILY RIDERS FOR MONTH	CHANGE FROM PRIOR YEAR
November 2015	11,064	382	37%
December 2015	11,896	397	42%
January 2016	12,532	404	13%
February 2016	15,726	542	0%
March 2016	18,287	590	4%
April 2016	10,412	347	17%
May 2016	10,735	357	62%
June 2016	6,452	215	30%
July 2016	6,500	217	25%
August 2016	6,398	208	27%
September 2016	7,428	256	38%
October 2016	10,591	342	29%
Twelve-month Total	128,949	358	23% increase

This information is provided graphically below.



The Tourism Development Commission requested that a survey be conducted of Downtown Trolley ridership primarily to determine if the riders are tourists. The Transportation Department conducted this survey as funds do not exist to hire a survey consultant. The survey was accomplished in the first week of each month from February through July as described below.

February Downtown-Trolley Rider Survey:

The February surveys were conducted on Tuesday, 2 February from 11:00 AM to 1:00 PM, Noon to 3:00 PM, and 6:00 PM to 8:00 PM; on Thursday, 4 February from 11:00 AM to 1:00 PM, 1:00 PM to 3:00 PM, and 1:00 PM to 5:00 PM; and on Saturday, 6 February from 11:00 AM to 1:00 PM and 6:00 PM to 8:00 PM. A total of 197 riders were surveyed.

March Downtown-Trolley Rider Survey:

The March surveys were conducted on Tuesday, 1 March from 11:00 AM to 1:00 PM, 4:00 PM to 6:00 PM, and 6:00 PM to 8:00 PM; on Thursday, 3 March from 11:00 AM to 1:00 PM, 1:00 PM to 3:00 PM, 3:00 PM to 5:00 PM; and 6:00 PM to 8:00 PM; and on Saturday, 5 March from 11:00 AM to 2:00 PM, 1:00 PM to 3:00 PM, and 6:00 PM to 8:00 PM. A total of 198 riders were surveyed.

April Downtown-Trolley Rider Survey:

The April surveys were conducted on Tuesday, 5 April from 11:00 AM to 1:00 PM, 1:00 PM to 4:00 PM, and 6:00 PM to 8:00 PM; on Thursday, 7 April from 11:00 AM to 1:00 PM, 1:00 PM to 3:00 PM, and 6:00 PM to 8:00 PM; and on Saturday, 9 April from 11:00 AM to 3:00 PM, and 6:00 PM to 8:00 PM. A total of 186 riders were surveyed.

May Downtown-Trolley Rider Survey:

The May surveys were conducted on Tuesday, 3 May from 11:00 AM to 1:00 PM and 6:00 PM to 8:00 PM; on Thursday, 5 May from 11:00 AM to 1:00 PM and 1:00 PM to 3:00 PM; and on Saturday, 7 May from 11:00 AM to 1:00 PM, 1:00 PM to 3:00 PM, and 6:00 PM to 8:00 PM. A total of 134 riders were surveyed.

June and July Downtown-Trolley Rider Survey:

The June surveys were conducted on Tuesday, 7 June from 1:00 PM to 3:00 PM; on Thursday, 9 June from 11:00 AM to 1:00 PM, 1:00 PM to 3:00 PM, and 6:00 PM to 8:00 PM; and on Saturday, 11 June from 1:00 PM to 3:00 PM; on Saturday, 12 July from 2:00 PM to 3:00 PM; and Saturday, 14 July from 3:00 PM to 4:00 PM. A total of 78 riders were surveyed.

Composite February through July Downtown-Trolley Rider Survey:

A total of 793 riders were surveyed in February through July. The table below reveals the residences and trip purposes. (Please note that the percentages do not always sum to 100% due to rounding errors.) The survey indicated that over the six months, 92% of the riders were engaged in tourist activities, with this percentage varying from a high of 96% in March to a low of 77% in June and July. (Note, respondents were allowed to provide more than one answer to this question.) It also indicated that 65% of the Downtown Trolley riders (511 surveyed riders) were from outside Arizona, with this percentage varying from a high of 76% in April to a low of 43% in June and July.

	Outside North America	Canada	(Not Arizona) United States	(Not Scottsdale) Arizona	Scottsdale
February 2016	2%	31%	38%	8%	21%
March 2016.....	5%	16%	47%	14%	18%
April 2016	13%	18%	45%	10%	15%
May 2016	9%	3%	42%	13%	33%
June and July 2016	8%	0%	35%	8%	50%
Six-month Total	7%	16%	42%	11%	24%
	<u>Sightseeing, Shopping, Dining</u>		<u>Work</u>	<u>School</u>	<u>Other</u>
February 2016	89%		6%	1%	4%
March 2016.....	96%		3%	0%	0%
April 2016	91%		9%	1%	0%
May 2016	94%		3%	0%	2%
June and July 2016	77%		17%	0%	5%
Six-month Total	92%		7%	0%	2%

Day-Tripper to Downtown Trolley Ridership Comparison Summary:

The Day Tripper operated only during the peak tourist season of January, February, and March; while the Downtown Trolley operates year-round. The table below compares daily riders and daily tourist riders for each trolley during its months of operation.

	2014 / 2015 January through March <u>DAY TRIPPER</u>	2015 / 2016 November through October <u>DOWNTOWN TROLLEY</u>	<u>DIFFERENCE</u>
Total Average Daily Riders	230	358	+56%
Estimated Daily Tourists	172	329	+91%

A comparison between the Day Tripper and Downtown Trolley daily riders and daily tourist riders for only the peak tourist months of January, February, and March is appropriate.

	2014 / 2015 January through March <u>DAY TRIPPER</u>	2015 / 2016 January through March <u>DOWNTOWN TROLLEY</u>	<u>DIFFERENCE</u>
Total Average Daily Riders	230	523	+127%
Estimated Daily Tourists	172	481	+180%

Day-Tripper to Downtown Trolley Cost Comparison:

For the 2014-2015 season, the Day Tripper operated from 26 December 2014 through 1 April 2015. The cost was \$270,000 for the trolley operation and \$30,000 for promotion – entirely funded by hotel bed tax revenue. The Downtown Trolley operates 360 days each year – every day except Christmas Day, New Year's Day, Memorial Day, Independence Day, and Labor Day. The total annual cost of the Downtown Trolley for the 2015-2016 season was approximately \$656,856 – of which \$300,000 is funded from hotel bed tax revenue and \$356,856 is funded from transportation fund revenue (primarily regional and Scottsdale transportation sales tax).

The table below compares the cost-per-day and cost-per-rider for both the Day Tripper and the Downtown Trolley for seven months of operation – considering the entire cost of the Downtown Trolley.

	<u>DAY TRIPPER</u>	<u>DOWNTOWN TROLLEY</u>	<u>DIFFERENCE</u>
Cost Per Day	\$3,125	\$1,825	-47%
Cost Per Rider	\$13.60	\$3.56	-71%
Cost per Tourist	\$18.10	\$4.19	-77%

The column labeled difference indicates the change in the cost-per-day, cost-per-rider, and cost-per-tourist from the previous year Day Tripper to the current year Downtown Trolley. The daily cost of the current Downtown Trolley is approximately 47% less than the daily cost of the previous Day Tripper. The Day Tripper only provided approximately three months of service, while the Downtown Trolley provides 12-month service. Also, the Downtown Trolley route is much shorter than the Day Tripper route. Additionally the current year Downtown Trolley cost-per-tourist-rider is 77% less than the previous year Day Tripper cost-per-tourist-rider. This large per tourist cost decrease occurs because many more tourists are riding the Downtown Trolley compared to the number of tourists that rode the Day Tripper.

The table below compares the cost-per-day and cost-per-rider for three months of Day Tripper operation and the twelve months of Downtown Trolley operation. These calculations consider only the hotel bed tax expenditure for the Downtown Trolley.

	<u>HOTEL BED TAX DAY TRIPPER</u>	<u>HOTEL BED TAX ONLY DOWNTOWN TROLLEY</u>	<u>DIFFERENCE</u>
Cost Per Day	\$3,125	\$833	-73%
Cost Per Rider	\$13.60	\$2.32	-83%
Cost per Tourist	\$18.10	\$2.53	-86%

(Please note the costs are provided on a per day, per rider, and per tourist rider basis, because the Day Tripper costs are for only January, February, and March 2015; while the Downtown Trolley costs are for 1 July 2015 through 30 June 2016. Also the Downtown Trolley 10-minute frequency began in late October 2015. The cost rider comparison must be on an average day and rider basis as the costs are for different month periods and the service is also for different month periods.)

Additional-Interesting Downtown Trolley Rider Information:

Additional information; including trolley entering location, trolley exiting location, destination; state, province, or country of residence; and hotel was also included in the survey.

The table below indicates the thirteen most frequently mentioned entering, exiting, and destination locations in frequency order for the total six months. The number in each column is the number of responses for each location. (Please note not all responses are indicated. Locations with less than 40 responses total in the six months are not provided for any of the six months.)

	<u>Six months</u>	<u>February</u>	<u>March</u>	<u>April</u>	<u>May</u>	<u>June and July</u>
Fashion Square	558	137	128	176	70	47
Unsure	301	111	76	95	14	5
Main Street	186	71	48	44	14	9
Old Town	185	40	44	59	32	10
Museum of The West.....	159	62	29	33	18	17
Marshall Way	80	3	18	6	39	14
Brown Avenue	71	2	11	21	34	3
Hotel.....	66	17	9	10	18	12
Home	66	10	4	14	22	16
5 th Avenue	57	17	12	13	13	2
Waterfront	42	13	0	13	12	4
Circle (Full Route).....	41	23	1	5	2	10
Stadium.....	40	0	38	0	0	2
Nordstrom's	33	5	20	0	0	8
Stetson Drive	32	0	11	3	7	11
Civic Center	28	0	25	2	0	1
Marshall Way Canal Bridge ..	28	4	14	1	3	6
3 rd Avenue.....	25	3	0	2	11	9
Loloma	21	5	0	0	12	4
1 st Avenue	20	5	0	3	12	0
Buckboard Trail.....	13	0	10	3	0	0
Art District	12	3	9	0	0	0
Horse Fountain	12	4	4	2	0	2
Drinkwater Boulevard	10	2	0	1	0	7

Fashion Square was the most frequently mentioned location in each of the six months, while “unsure” was the second most frequently mentioned destination for February, March, and April. In May, “unsure” was the eighth most frequently mentioned destination. In June and July, “unsure” was the fourteenth most frequently mentioned destination. The Scottsdale Stadium was the fifth most frequently mentioned location in March during spring training, while the Waterfront was not mentioned once in March. Circle – indicating riding the trolley for its entire route without exiting – was the sixth most frequently mentioned location in February, tied for seventh in June and July, and rarely mentioned in March, April, and May.

The survey respondents were also asked to identify how they learned of the Downtown Trolley, with the following most frequent responses:

Word-of-Mouth	231
Street Signs	111
Hotel.....	106
Website	72
Saw Trolley	72
Brochure	44
Previous Visit	21
Work.....	14
Map	10

Thirty-five states (excluding Arizona) and the District of Columbia were identified as home to 42% of all surveyed riders. The table below indicates the most frequently mentioned states, Canadian provinces, and other countries. All Canadian provinces and all mentioned countries are listed.

<u>State</u>	<u>Riders</u>	<u>Province</u>	<u>Riders</u>	<u>Country</u>	<u>Riders</u>
California	46	Ontario	35	Switzerland.....	10
Minnesota	32	British Columbia	26	Thailand	6
Illinois.....	24	Alberta	21	Mexico.....	4
Colorado	18	Newfoundland.....	10	United Kingdom.....	4
Michigan	16	Saskatchewan	8	Brazil	3
New York	14	Manitoba	2	China	3
Pennsylvania	14	Nova Scotia	2	Germany	3
Missouri	13	New Brunswick	0	India	3
Ohio	13	Prince Edward Island.....	0	Australia	2
Texas.....	13	Quebec	0	Belgium	2
Wisconsin	13			Bermuda.....	2
Washington.....	11	Unnamed	17	France	2
Florida.....	10			Holland	2
New Jersey.....	7			Iran	2
Montana.....	5			Jamaica.....	2
South Carolina.....	5			Venezuela	2
.....				Ireland	1

Of the riders, 34% were staying in hotels. The various Marriott hotels were mentioned 45 times. The various Hyatt hotels were mentioned 33 times. The various Hilton hotels were mentioned 24 times. Other hotels were mentioned the indicated number of times: Valley Ho (29), Best Western (14), various Holiday Inn (14), Chaparral Suites (9), and Fire Sky (9).

Three questions regarding trolley use were included in the survey, with the following response summaries. (Please note the percentages do not always sum to 100% because of rounding errors.)

All surveyed riders

Because of the Trolley ...	<u>AGREE</u>	<u>DISAGREE</u>	<u>UNSURE</u>	<u>NO ANSWER</u>
"will you be seeing more of Scottsdale?"	58%.....	1%	6%	36%
"will you be spending more money in Scottsdale?"	47%.....	6%	10%	37%
"are you more likely to return to Scottsdale?"	56%.....	2%	5%	36%

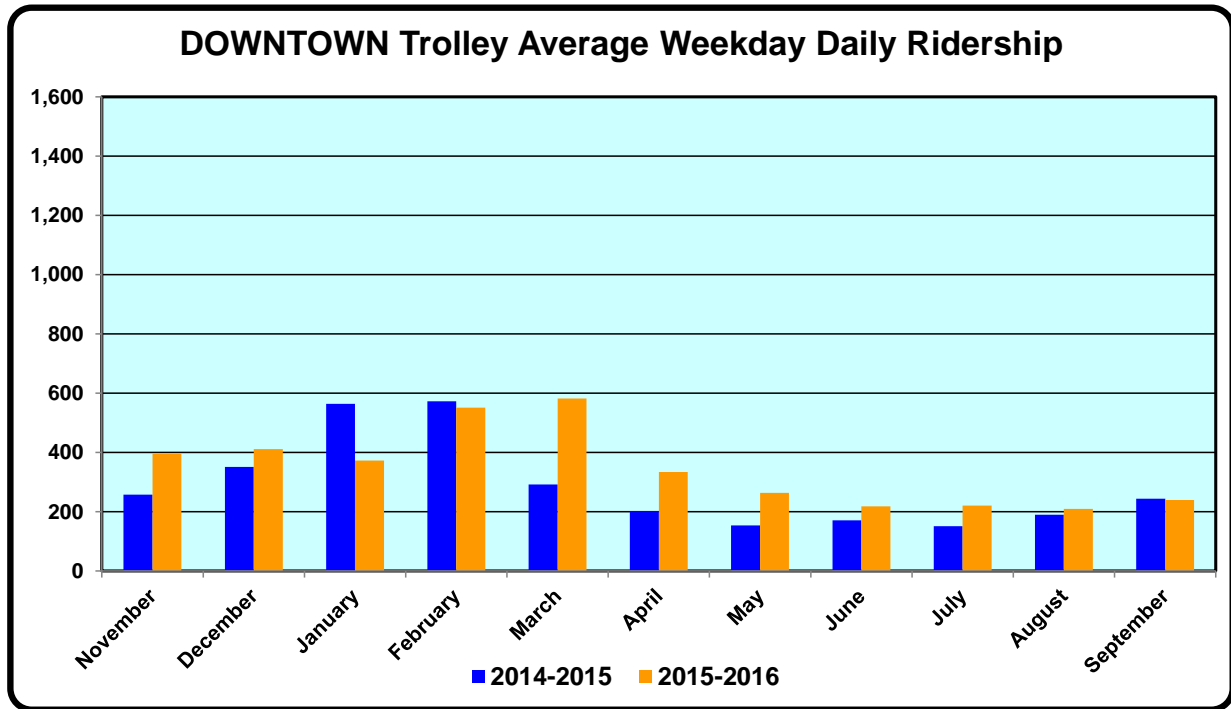
Surveyed riders who answered

Because of the Trolley ...	<u>AGREE</u>	<u>DISAGREE</u>	<u>UNSURE</u>
"will you be seeing more of Scottsdale?"	90%.....	1%	9%
"will you be spending more money in Scottsdale?"	74%.....	9%	16%
"are you more likely to return to Scottsdale?"	89%.....	3%	9%

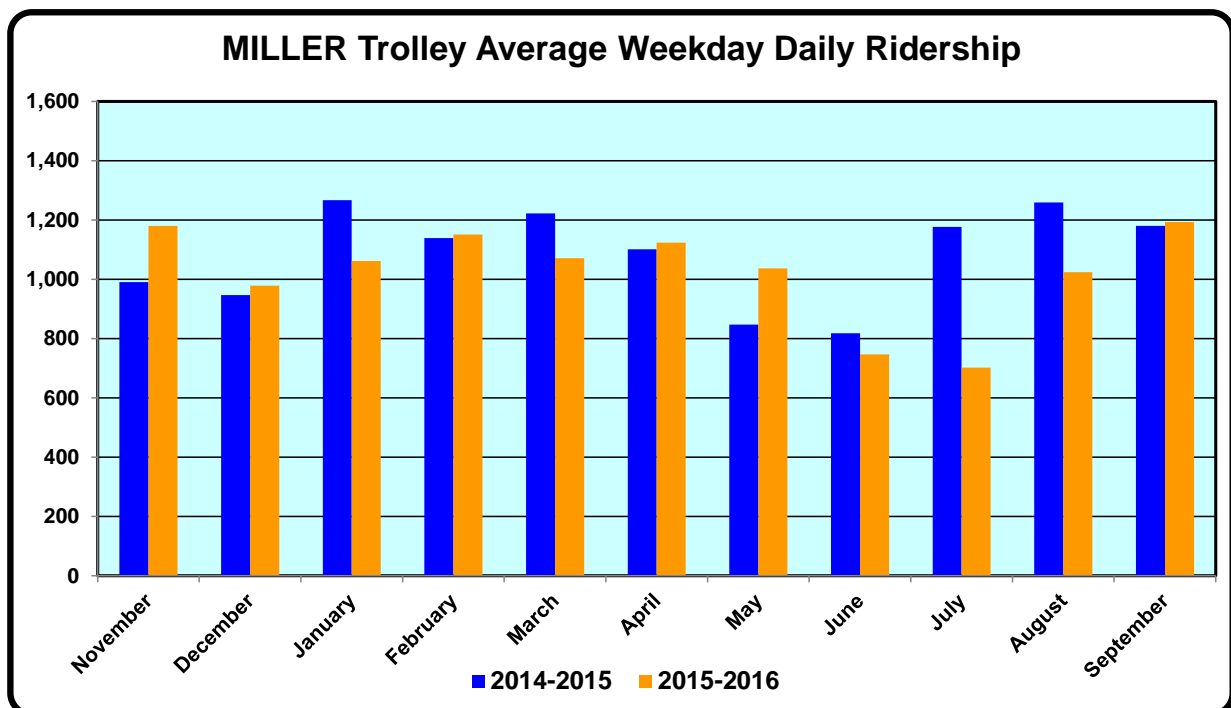
Downtown Trolley to Other Scottsdale Trolley and Bus Ridership Comparison Summary:

The Downtown Trolley ridership was also compared to ridership of the other Scottsdale trolleys and regional buses that operate in Scottsdale. These data are only for weekday service.

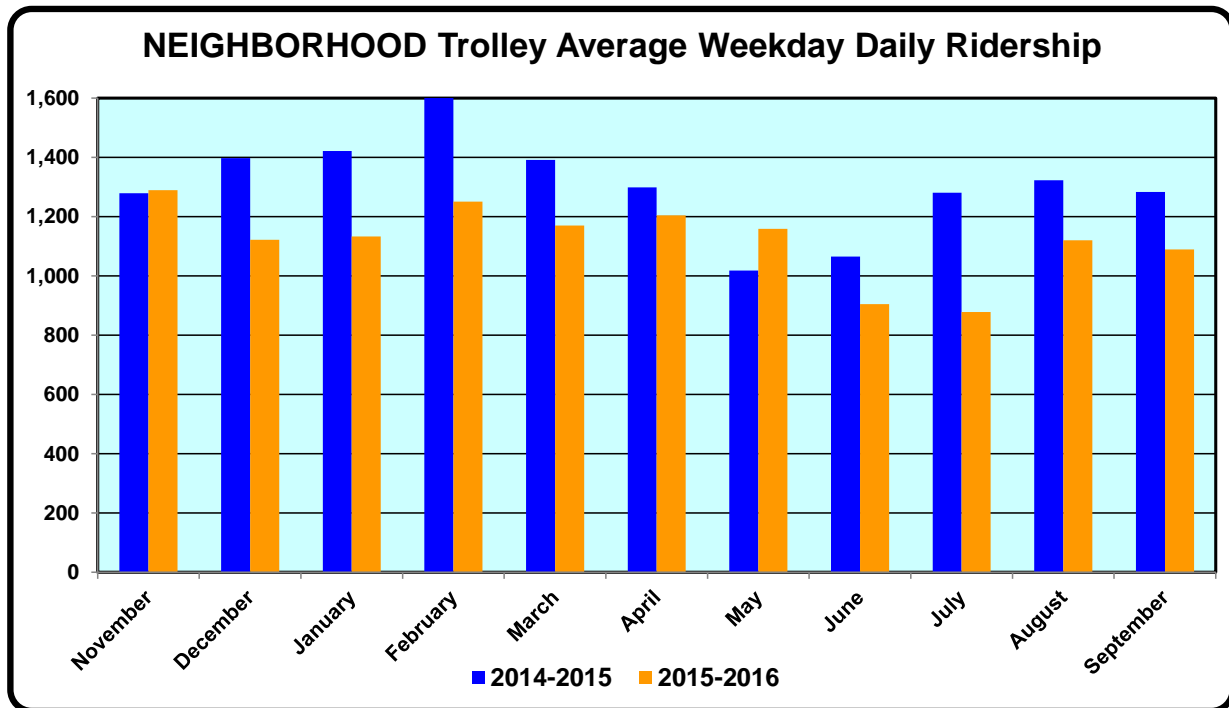
The first graph compares the Downtown Trolley average weekday ridership by month for the twelve months in 2014-2015 with 15-minute frequency for the twelve months in 2015-2016 with 10-minute frequency.



The second graph compares the 2014-2015 to the 2015-2016 average weekday monthly ridership for the Miller Road Trolley.

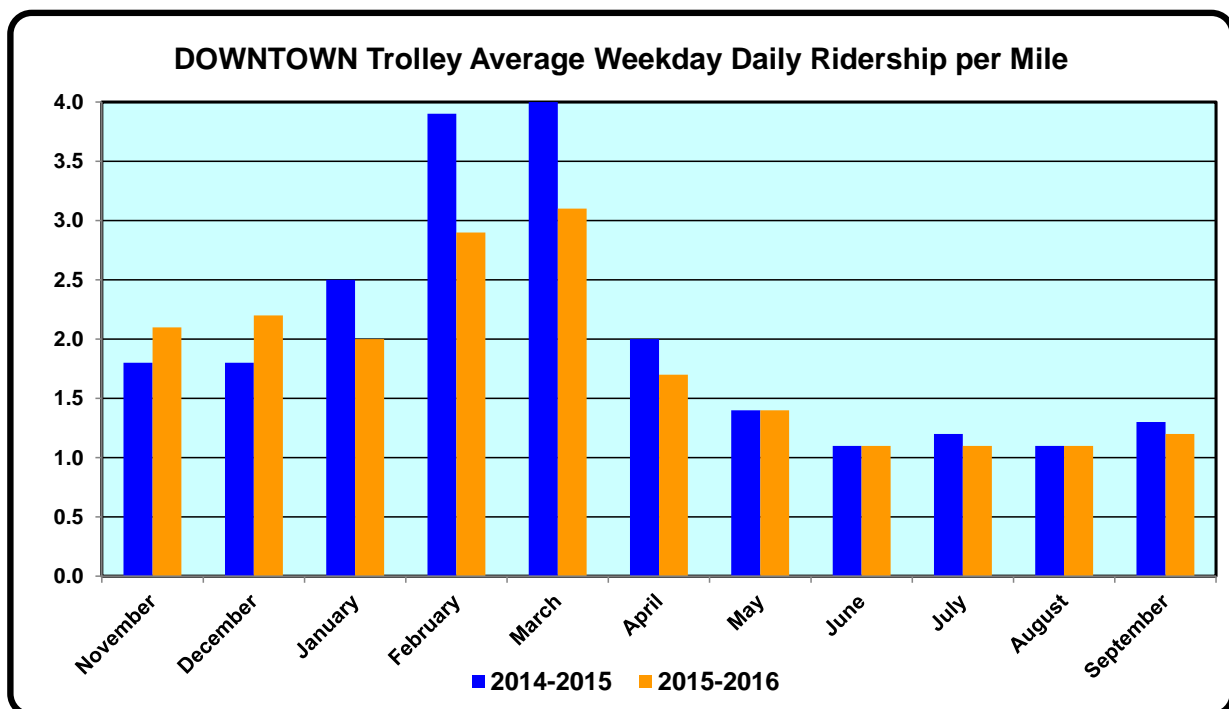


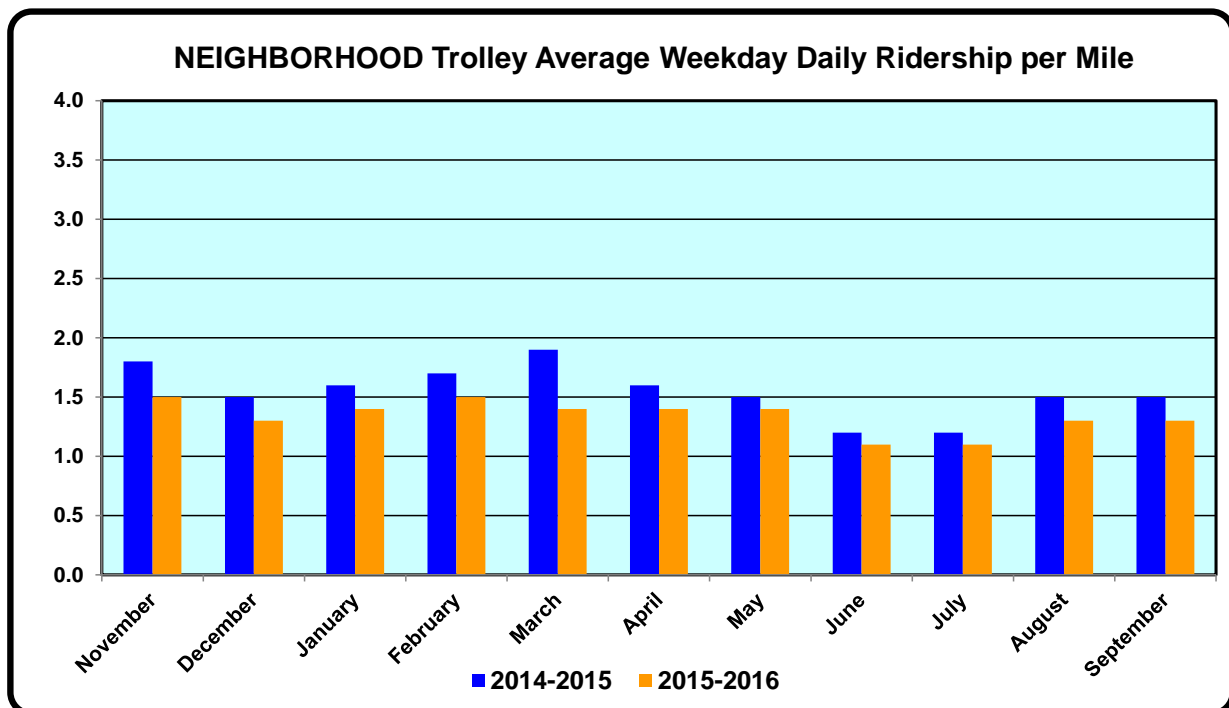
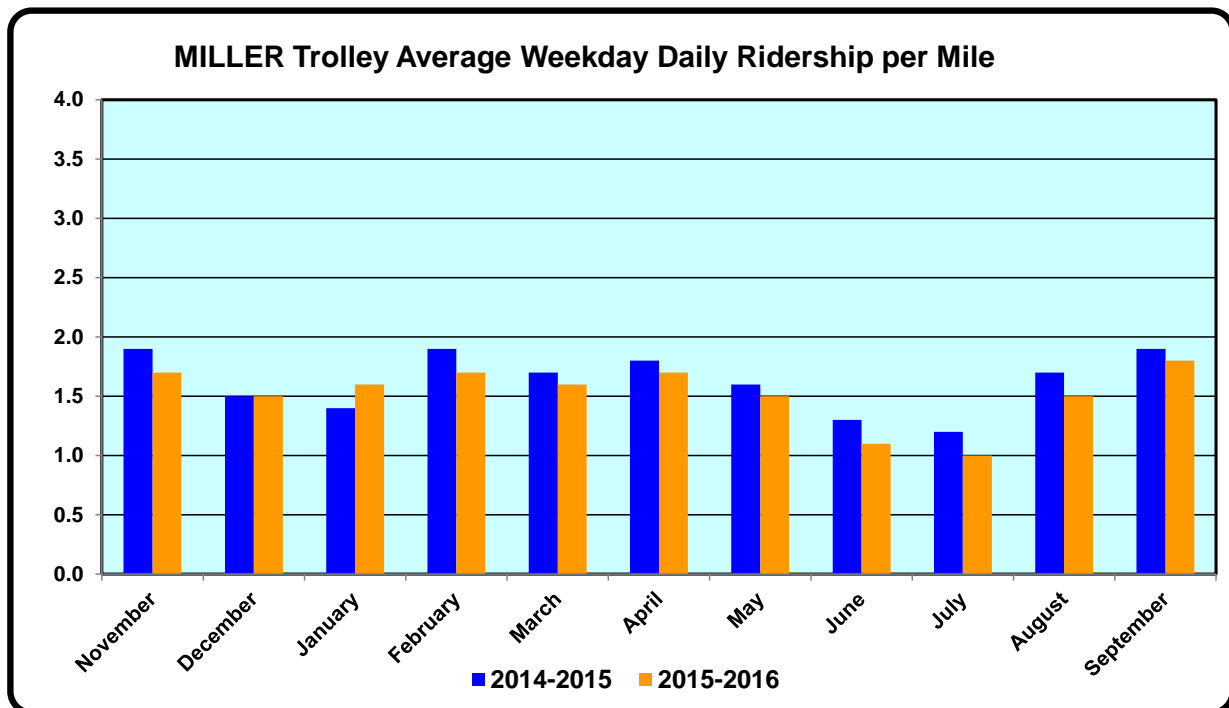
The third graph compares the 2014-2015 to the 2015-2016 average weekday monthly ridership for the Neighborhood Trolley.



The above three graphs clearly reveal that on an average weekday total ridership basis, the Downtown Trolley generally experiences half as many riders as the other two Scottsdale trolleys that provided service in 2014-2015 and 2015-2016.

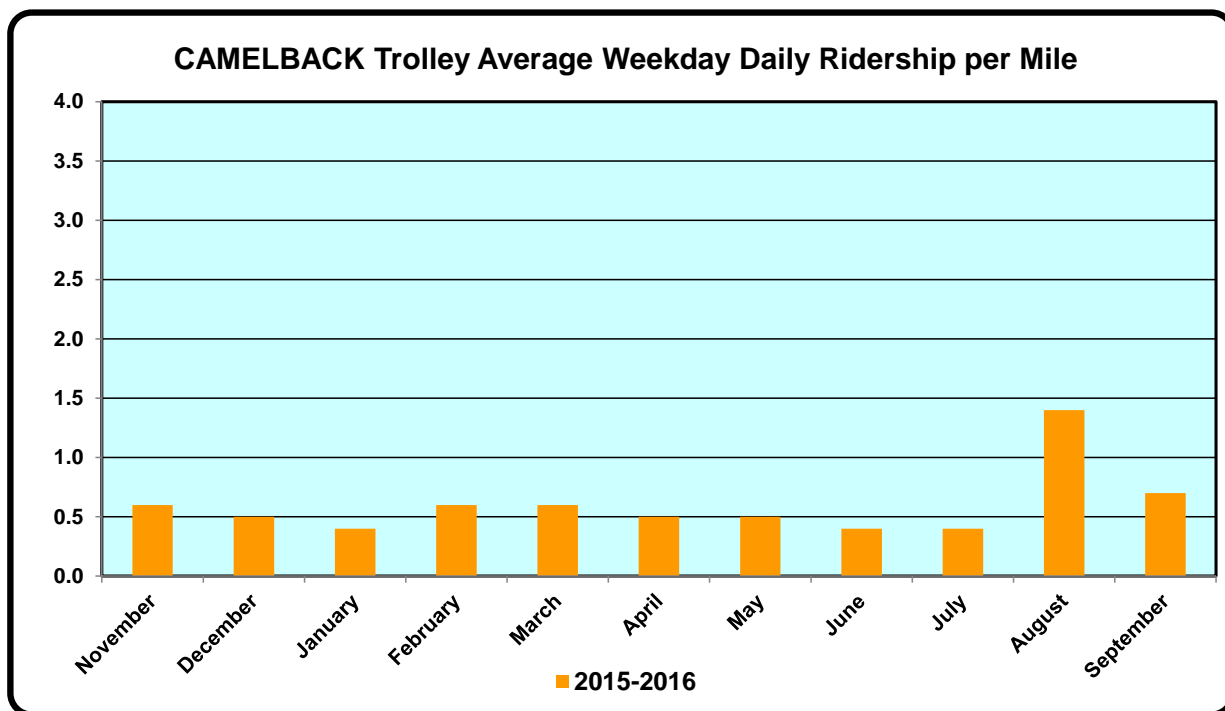
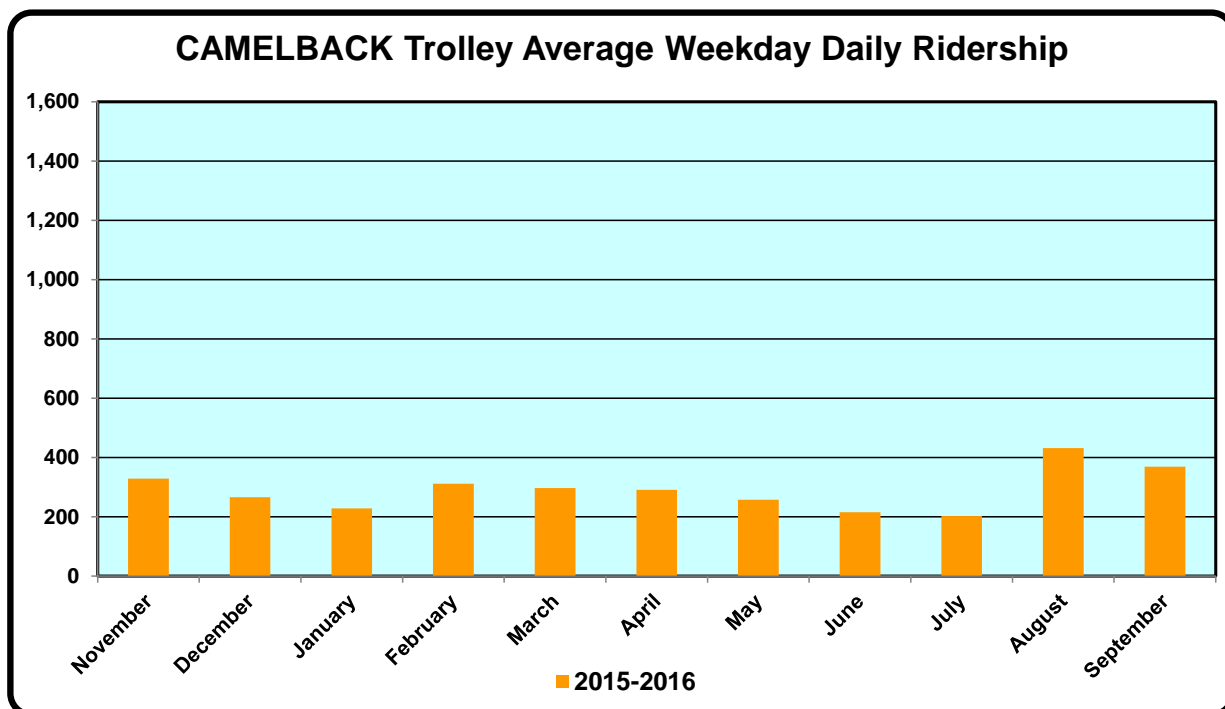
The following three graphs compare ridership on average weekday daily riders-per-mile.





Using this measure, during the peak tourist months of February and March, the Downtown Trolley experiences twice as many riders per mile as the other two Scottsdale trolleys. During the lower-tourist months of November, December, January, April, and May; the Downtown Trolley experiences approximately the same riders-per-mile as the Miller Road and Neighborhood Trolleys. During the non-tourist months of June, July, August, and September; the Downtown Trolley experiences fewer riders-per-mile than the other two Scottsdale trolleys.

The two graphs below indicate the 2015-2016 average weekday ridership and riders-per-mile for the new Camelback Trolley which began operation late October 2015. The Camelback Trolley is experiencing fewer riders than the Downtown Trolley.



The ridership of all buses and trolleys in Scottsdale was compared from 2014 Calendar Year Quarter 4 (October through December) to 2016 Calendar Year Quarter 3 (July through September). Thirteen buses and trolleys existed in Scottsdale prior to the addition of the Camelback Trolley in late October 2015. Therefore, thirteen buses and trolleys existed from the fourth quarter of 2014 through the third quarter of 2015. Fourteen buses and trolleys existed in Scottsdale from the fourth quarter of 2015 through the third quarter of 2016. The quarterly average weekday riders-per-mile were determined for each route, and then ranked from highest to lowest. The table on the following page provides the partial results of these rankings.

The Downtown Trolley is the highest ridership-per-mile in the peak tourist months of January through March in both 2015 and 2016. The Downtown Trolley ranks sixth or lower in the other nine months of the year. The Neighborhood Trolley is the highest or second highest ridership-per-mile in six of the past eight quarters. While the Camelback Trolley ranks higher than or equal to the Camelback Bus, its highest ranking is 4th.

AVERAGE WEEKDAY RIDERS-PER-MILE BY CALENDAR YEAR QUARTER

Quarter	2014 Q4	2015 Q1	2015 Q2	2015 Q3	2015 Q4	2016 Q1	2016 Q2	2016 Q3
Camelback Bus	8	8	7	7	10	10	10	10
Camelback Trolley	NA	NA	NA	NA	4	7	5	7
Downtown Trolley	7	1	9	10	6	1	8	8
Miller Road Trolley	4	7	6	5	5	5	6	5
Neighborhood Trolley.....	1	2	1	1	2	3	2	3

(Note in the fourth quarter 2015 and third quarter 2016, quarters when a trolley was not the highest ranked average weekday riders-per-mile, the Thomas Road Bus was the highest ranked.)

Cost per Rider:

The cost per rider for fiscal year 2014-2015 (from 1 July 2014 through 30 June 2015) was also determined. This is the most recent available data for buses for a full fiscal year. The table below provides these data.

Priest Road Bus Route 56	\$19.86
Greenway Road Bus Route 154	\$11.80
Shea Boulevard Bus Route 80	\$7.73
Bell Road Bus Route 170	\$6.14
Hayden Road Bus Route 81	\$4.79
Camelback Road Bus Route 50	\$3.94
Thomas Road Bus Route 29	\$3.00
Downtown Trolley	\$2.95
Scottsdale Road Bus Route 72	\$2.89
Indian School Road Bus Route 41	\$2.60
McDowell Road Bus Route 17	\$2.35
Neighborhood Trolley	\$2.32
Miller Road Trolley	\$0.50
AVERAGE	\$5.45
AVERAGE (without routes over \$10.00)	\$3.56

Cost-per-rider for fiscal year 2015-2016 (from 1 July 2015 through 30 June 2016) is available for the four Scottsdale Trolley routes and is provided below.

Camelback Road Trolley	\$3.39
Downtown Trolley	\$3.02
Neighborhood Trolley	\$2.67
Miller Road Trolley	\$1.63
AVERAGE	\$2.68
AVERAGE (without Downtown Trolley)	\$2.56

Previously Suggested Downtown Trolley Criteria:

At the 17 March 2015 Tourism Development Commission meeting, the Transportation Department suggested the following three criteria for determining if the Downtown Trolley should qualify for hotel bed tax revenue:

1. Ridership exceed 700 per day.
2. Portion of trolley riders staying in Scottsdale hotel exceeds 60%.
3. Cost-per-rider is less than the citywide bus and trolley average cost-per-rider.

The maximum average Downtown Trolley ridership of 542 is less than 700 per day.
The portion of Downtown Trolley riders staying in metropolitan Phoenix hotels of 34% is less than 60%.
The Downtown Trolley cost-per-rider of \$3.02 is less than the Citywide bus and trolley average of \$3.56.

While the portion of Downtown Trolley riders staying in metropolitan Phoenix hotels is 34%, the portion of Downtown Trolley ridership from residents outside of Scottsdale is 76% and the portion of riders sightseeing, shopping, and dining is 92%.

While the Downtown Trolley cost-per-rider of \$3.02 is less than the Citywide bus and trolley cost, it is more than the average of the other trolleys of \$2.56.

Attachments

- Survey Form
- Composite Six-month Survey Response Summary by number
- Composite Six-month Survey Response Summary by percentage
- February Survey Response Summary by number
- February Survey Response Summary by percentage
- March Survey Response Summary by number
- March Survey Response Summary by percentage
- April Survey Response Summary by number
- April Survey Response Summary by percentage
- May Survey Response Summary by number
- May Survey Response Summary by percentage
- June and July Survey Response Summary by number
- June and July Survey Response Summary by percentage

City of Scottsdale Downtown Trolley Survey 2016

1. Where did you board the trolley? (Nearest major cross streets) _____
2. How did you get to the trolley stop where you boarded?
☐ Walk ☐ Bike ☐ Car ☐ Trolley ☐ VM Bus ☐ Other _____
3. How far did you walk to get to the trolley stop where you boarded?
 _____ Miles or _____ Minutes or _____ Blocks
4. Where do you plan to get off the trolley? _____
5. What is your final destination? _____
6. How will you get to your final destination after you get off the trolley?
☐ Walk ☐ Bike ☐ Car ☐ Bus _____ ☐ Other _____
7. What is the primary purpose of your trip?
☐ Sightseeing ☐ Shopping ☐ Dining ☐ Work ☐ School ☐ Other _____
8. Household Annual Income?
☐ Under \$50,000 ☐ \$50,000 to \$75,000 ☐ \$75,000 to \$100,000 ☐ \$100,000 to \$125,000 ☐ over \$125,000
9. How did you first become aware of this trolley?
☐ Website ☐ Hotel Staff ☐ Word of Mouth ☐ Street Signage ☐ Other _____
10. Primary residence: ☐ Scottsdale ☐ Other Arizona City _____
☐ US State _____ ☐ Which Canadian Province _____ ☐ Which Other Country _____
11. Are you staying in a local hotel? ASK: Hotel Name _____ ☐ No

12. Question For Out of State Riders:

<u>As a result of the trolley (answers to the right)</u>	<u>Agree</u>	<u>Disagree</u>	<u>Not Sure</u>
A. I saw more of Scottsdale, than I otherwise would have	1	2	3
B. I will spend more money in Scottsdale	1	2	3
C. I'm more encouraged to come back to Scottsdale	1	2	3

Date: _____

Time: _____

DATE						February																																																					
WALK						BIKE						CAR						TROLLEY						BUS						OTHER																													
43%						0%						47%						5%						4%						1%																													
MOST FREQUENT LOADING POINT, EXIT, AND DESTINATION																																																											
Fashion Square						Unsure						Main Street						Museum of the West						Old Town						Circle																													
24.8%						20.1%						12.9%						11.2%						7.2%						4.2%																													
WALK																								BIKE						CAR						TROLLEY						BUS						OTHER											
64%						0%						29%						1%						3%						2%																													
SIGHTSEEING						SHOPPING						DINING						WORK						SCHOOL						OTHER																													
48%						17%						24%						6%						1%						4%																													
< \$50,000						\$50,000 to \$75,000						\$75,000 to \$100,000						\$100,000 to \$125,000						> \$125,000						NO ANSWER																													
11%						11%						13%						11%						21%						32%																													
WEBSITE						HOTEL						WORD OF MOUTH						STREET SIGNS						OTHER																																			
12%						12%						34%						12%						31%																																			
SCOTTSDALE						ARIZONA						UNITED STATES						CANADA						OTHER																																			
21%						8%						38%						31%						2%																																			
HOTEL						24%																																																					
Agree						Disagree						Unsure						No Answer						<table border="1"> <tr> <td colspan="2">More of Scottsdale</td> <td colspan="2">Spend More</td> <td colspan="2">Return</td> </tr> <tr> <td>68%</td> <td>92%</td> <td>61%</td> <td>82%</td> <td>69%</td> <td>92%</td> </tr> <tr> <td>0%</td> <td>0%</td> <td>7%</td> <td>10%</td> <td>2%</td> <td>3%</td> </tr> <tr> <td>6%</td> <td>8%</td> <td>6%</td> <td>8%</td> <td>4%</td> <td>5%</td> </tr> <tr> <td>26%</td> <td></td> <td>26%</td> <td></td> <td>26%</td> <td></td> </tr> </table>						More of Scottsdale		Spend More		Return		68%	92%	61%	82%	69%	92%	0%	0%	7%	10%	2%	3%	6%	8%	6%	8%	4%	5%	26%		26%		26%	
More of Scottsdale		Spend More		Return																																																							
68%	92%	61%	82%	69%	92%																																																						
0%	0%	7%	10%	2%	3%																																																						
6%	8%	6%	8%	4%	5%																																																						
26%		26%		26%																																																							

DATE	March				
WALK	BIKE	CAR	TROLLEY	BUS	OTHER
152	0	0	0	0	0
MOST FREQUENT LOADING POINT, EXIT, AND DESTINATION					
Fashion Square	Unsure	Main Street	Old Town	Stadium	Museum of the West
128	76	48	44	38	29
WALK	BIKE	CAR	TROLLEY	BUS	OTHER
139	0	51	1	1	0
SIGHTSEEING	SHOPPING	DINING	WORK	SCHOOL	OTHER
128	60	47	8	0	1
< \$50,000	\$50,000 to \$75,000	\$75,000 to \$100,000	\$100,000 to \$125,000	> \$125,000	NO ANSWER
23	10	48	6	26	85
WEBSITE	HOTEL	WORD OF MOUTH	STREET SIGNS	OTHER	
14	12	40	25	90	
SCOTTSDALE	ARIZONA	UNITED STATES	CANADA	OTHER	
36	28	94	31	9	
HOTEL					
83					
Agree	More of Scottsdale		Spend More	Return	
Disagree	105		85	105	
Unsure	2		13	2	
No Answer	14		23	14	
	77		77	77	

DATE		April		TIME	
WALK	BIKE	CAR	TROLLEY	BUS	OTHER
97	0	66	10	2	16
MOST FREQUENT LOADING POINT, EXIT, AND DESTINATION					
Fashion Square	Unsure	Old Town	Main Street	Museum of the West	Brown Avenue
176	95	59	44	33	21
WALK	BIKE	CAR	TROLLEY	BUS	OTHER
128	4	46	3	3	11
SIGHTSEEING	SHOPPING	DINING	WORK	SCHOOL	OTHER
134	74	83	28	2	0
< \$50,000	\$50,000 to \$75,000	\$75,000 to \$100,000	\$100,000 to \$125,000	> \$125,000	NO ANSWER
21	7	7	14	33	104
WEBSITE	HOTEL	WORD OF MOUTH	STREET SIGNS	OTHER	
24	32	68	14	54	
SCOTTSDALE	ARIZONA	UNITED STATES	CANADA	OTHER	
27	18	82	33	23	
HOTEL					
82					
Agree	More of Scottsdale		Spend More		Return
Disagree	120		92		117
Unsure	0		4		2
No Answer	6		30		7
	60		60		60

DATE		May		TIME	
WALK	BIKE	CAR	TROLLEY	BUS	OTHER
120	1	17	4	1	0
MOST FREQUENT LOADING POINT, EXIT, AND DESTINATION					
Fashion Square	Marshall Way	Brown Avenue	Old Town	Home	Hotel
70	39	34	32	22	18
WALK	BIKE	CAR	TROLLEY	BUS	OTHER
112	1	23	2	1	2
SIGHTSEEING	SHOPPING	DINING	WORK	SCHOOL	OTHER
63	74	61	7	0	5
< \$50,000	\$50,000 to \$75,000	\$75,000 to \$100,000	\$100,000 to \$125,000	> \$125,000	NO ANSWER
26	9	19	35	4	41
WEBSITE	HOTEL	WORD OF MOUTH	STREET SIGNS	OTHER	
9	21	38	38	23	
SCOTTSDALE	ARIZONA	UNITED STATES	CANADA	OTHER	
44	17	55	4	12	
HOTEL					
53					
Agree	More of Scottsdale		Spend More		Return
Disagree	69		57		63
Unsure	0		7		3
No Answer	2		7		5
	63		63		63

DATE	June and July
------	---------------

WALK	BIKE	CAR	TROLLEY	BUS	OTHER
54	0	11	6	0	0

WALK	BIKE	CAR	TROLLEY	BUS	OTHER
55	0	16	0	2	2

SIGHTSEEING	SHOPPING	DINING	WORK	SCHOOL	OTHER
32	27	18	17	0	5

< \$50,000	\$50,000 to \$75,000	\$75,000 to \$100,000	\$100,000 to \$125,000	> \$125,000	NO ANSWER
12	12	6	11	0	38

WEBSITE	HOTEL	WORD OF MOUTH	STREET SIGNS	OTHER
3	18	21	11	32

SCOTTSDALE	ARIZONA	UNITED STATES	CANADA	OTHER
39	6	27	0	6

HOTEL
7

	More of Scottsdale	Spend More	Return
Agree	32	16	27
Disagree	2	9	4
Unsure	11	8	10
No Answer	33	43	37

DOWNTOWN TROLLEY

10-Minute Frequency Results

MARCH 2015 RECOMMENDATION



1. **Discontinue Day Tripper**
2. **\$300,000 hotel tax to Downtown Trolley
(\$150,000 sales tax to Downtown Trolley)**
3. **\$300,000 sales tax to Camelback Trolley
(\$85,000 sales tax to Camelback Trolley)**

DATA AND INFORMATION



Ridership:

November 2015 to October 2016

Survey:

February 2016 to July 2016

Costs

DOWNTOWN TROLLEY RIDERSHIP



23% Increase in 12 Months

May Highest at 62% Increase

December Second at 42% Increase

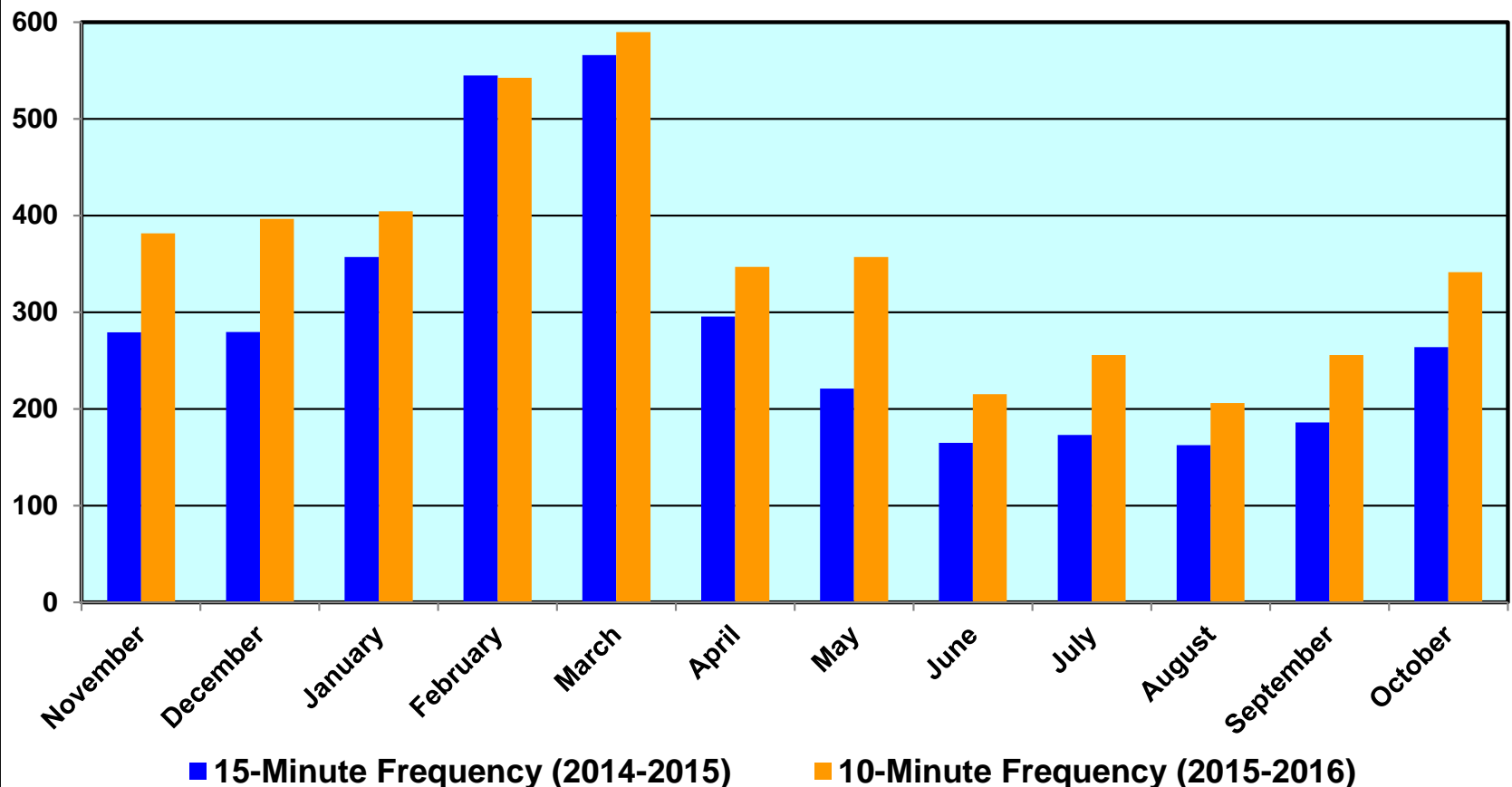
February Lowest at 0% Increase

March Next to Lowest at 4% Increase

DOWNTOWN TROLLEY RIDERSHIP



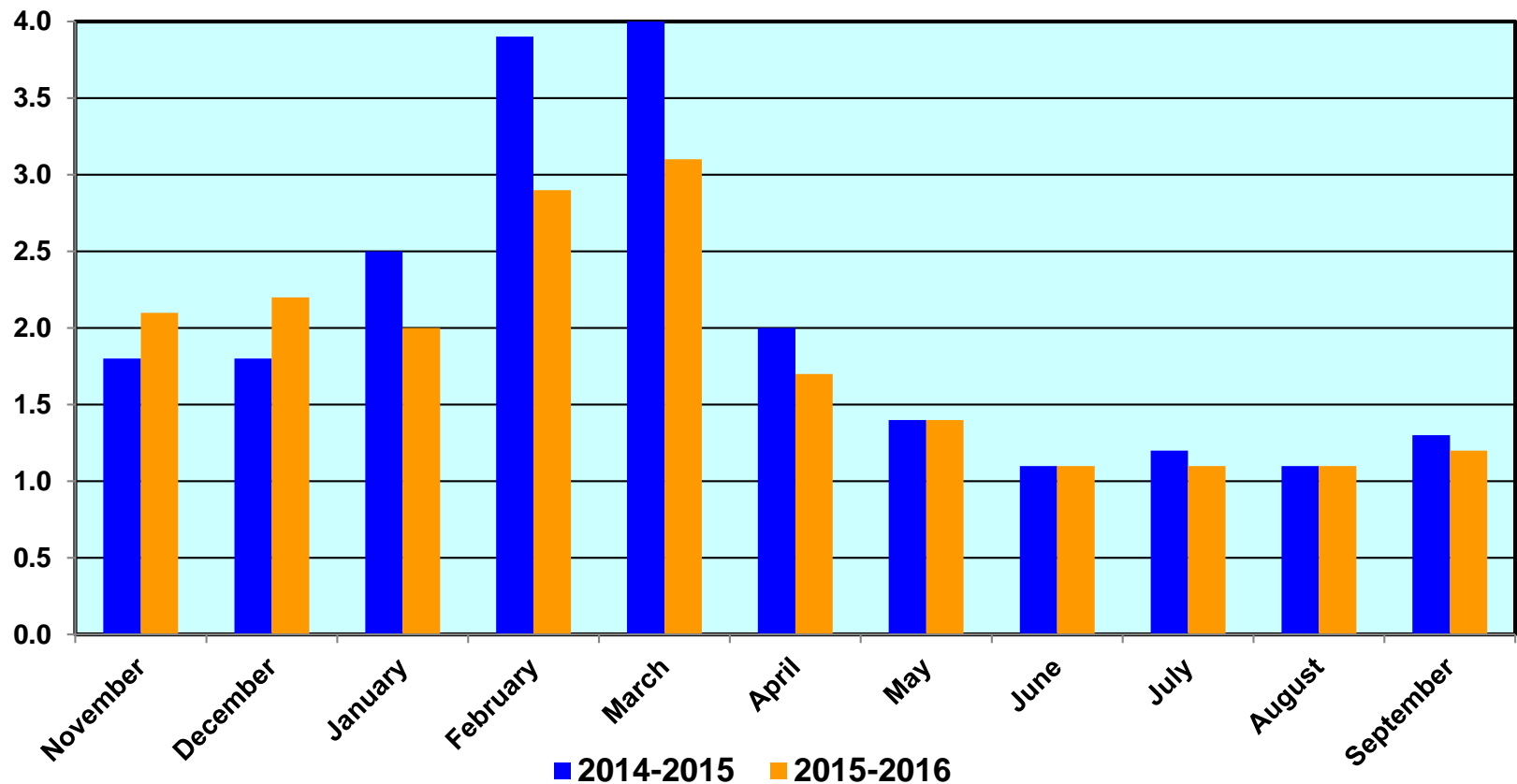
Downtown Trolley Average 7-day Daily Ridership



DOWNTOWN TROLLEY RIDERSHIP



DOWNTOWN Trolley Weekday Daily Ridership per Trip per Mile



DOWNTOWN TROLLEY RIDER SURVEY



793 Riders

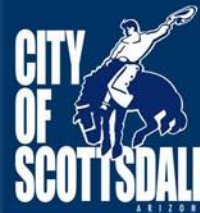
February through July

40 Time Periods

Tuesday, Thursday, Saturday

Lunch Hours, Afternoons, Evenings

SURVEY – RESIDENCY



7% Outside North America

16% Canada

42% United States, Outside Arizona

11% Arizona, Outside Scottsdale

24% Scottsdale

SURVEY – DOWNTOWN REASON



92% Sightseeing, Shopping, Dining

7% Work

2% Other

SURVEY – ORIGIN AND DESTINATION



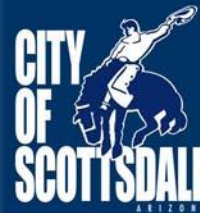
1. Fashion Square
2. Unsure
3. Main Street
4. Old Town
5. Museum of the West

SURVEY – AWARENESS



1. Word of Mouth
2. Street Signs
3. Hotel
4. Website
5. Saw Trolley

DAY TRIPPER TO DOWNTOWN TROLLEY



January through March

Daily Average Riders

Day Tripper:	230
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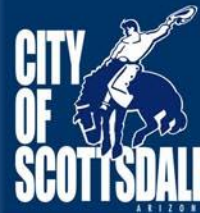
Downtown Trolley:	523
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Daily Tourist Riders

Day Tripper:	172
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Downtown Trolley:	481
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DAY TRIPPER TO DOWNTOWN TROLLEY



January through March

Cost per Rider

Day Tripper:	\$13.60
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Downtown Trolley:	\$2.32
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Cost per Tourist Rider

Day Tripper:	\$18.10
--------------	---------

Downtown Trolley:	\$2.53
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DOWNTOWN TROLLEY TO ALL TRANSIT



Fiscal Year 2014 – 2015

Cost per Rider

Average Buses and Trolleys: \$3.56

Downtown Trolley: \$2.95

DOWNTOWN TROLLEY TO TROLLEYS



Fiscal Year 2015 – 2016

Cost per Rider

Camelback Trolley:	\$3.39
--------------------	--------

Neighborhood Trolley:	\$2.67
-----------------------	--------

Miller Road Trolley	\$1.63
---------------------	--------

AVERAGE:	\$2.56
----------	--------

Downtown Trolley	\$3.02
------------------	--------

SUGGESTED CRITERIA TO ACTUAL



CRITERIA

ACTUAL

700 Daily Riders

542

60% in Scottsdale Hotels

< 34%

\$3.56 Average Transit Cost

\$3.02

SUGGESTED CRITERIA TO ACTUAL



60% in Scottsdale Hotels < 34%

76% Outside Scottsdale

92% Sightseeing, Shopping, Dining

SUGGESTED CRITERIA TO ACTUAL



<u>\$3.56 Average Transit Cost</u>	<u>\$3.02</u>
------------------------------------	---------------

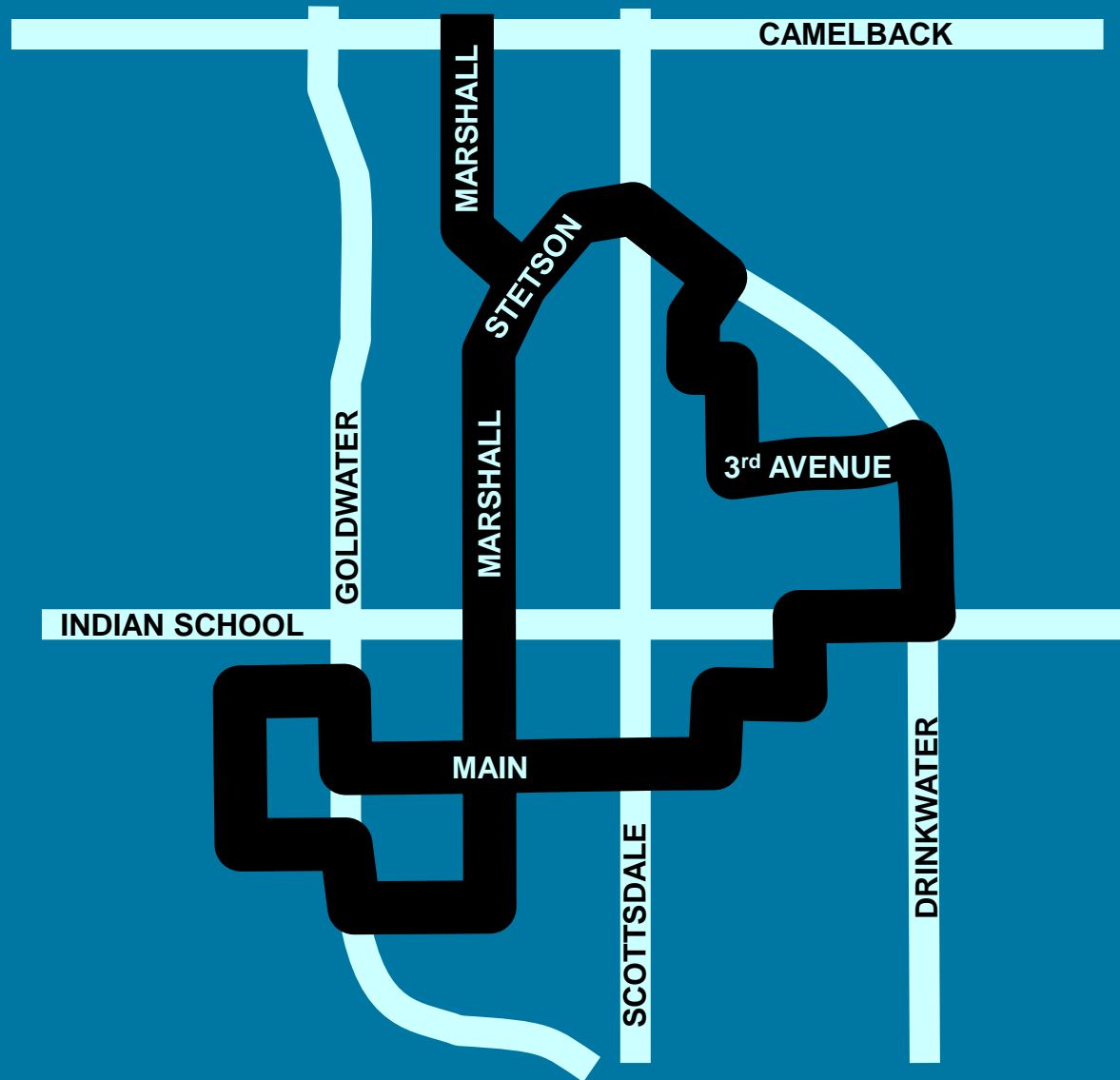
Average Trolley Cost	\$2.56
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DOWNTOWN TROLLEY



Only if Asked

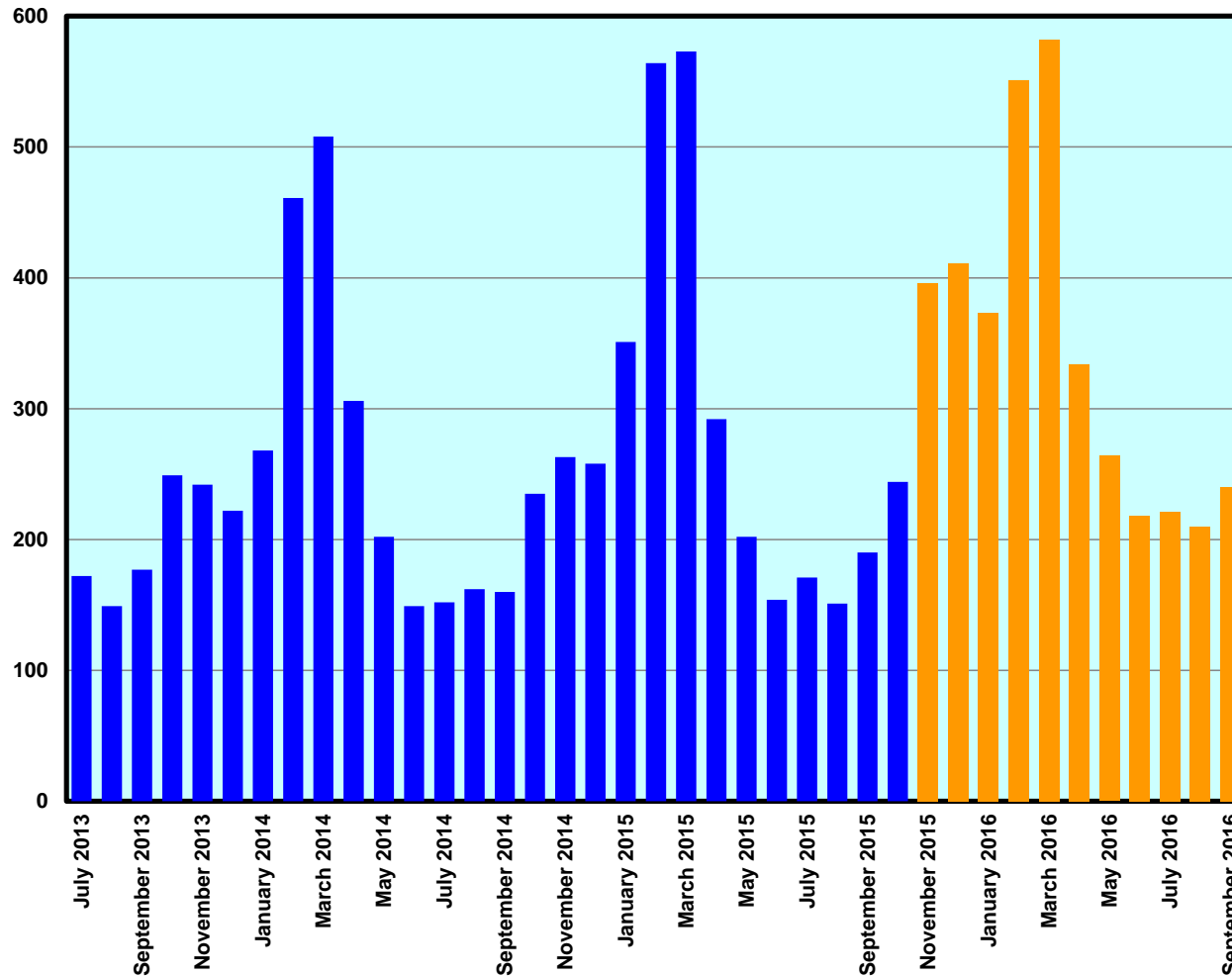
CURRENT DOWNTOWN TROLLEY ROUTE



HISTORIC DOWNTOWN



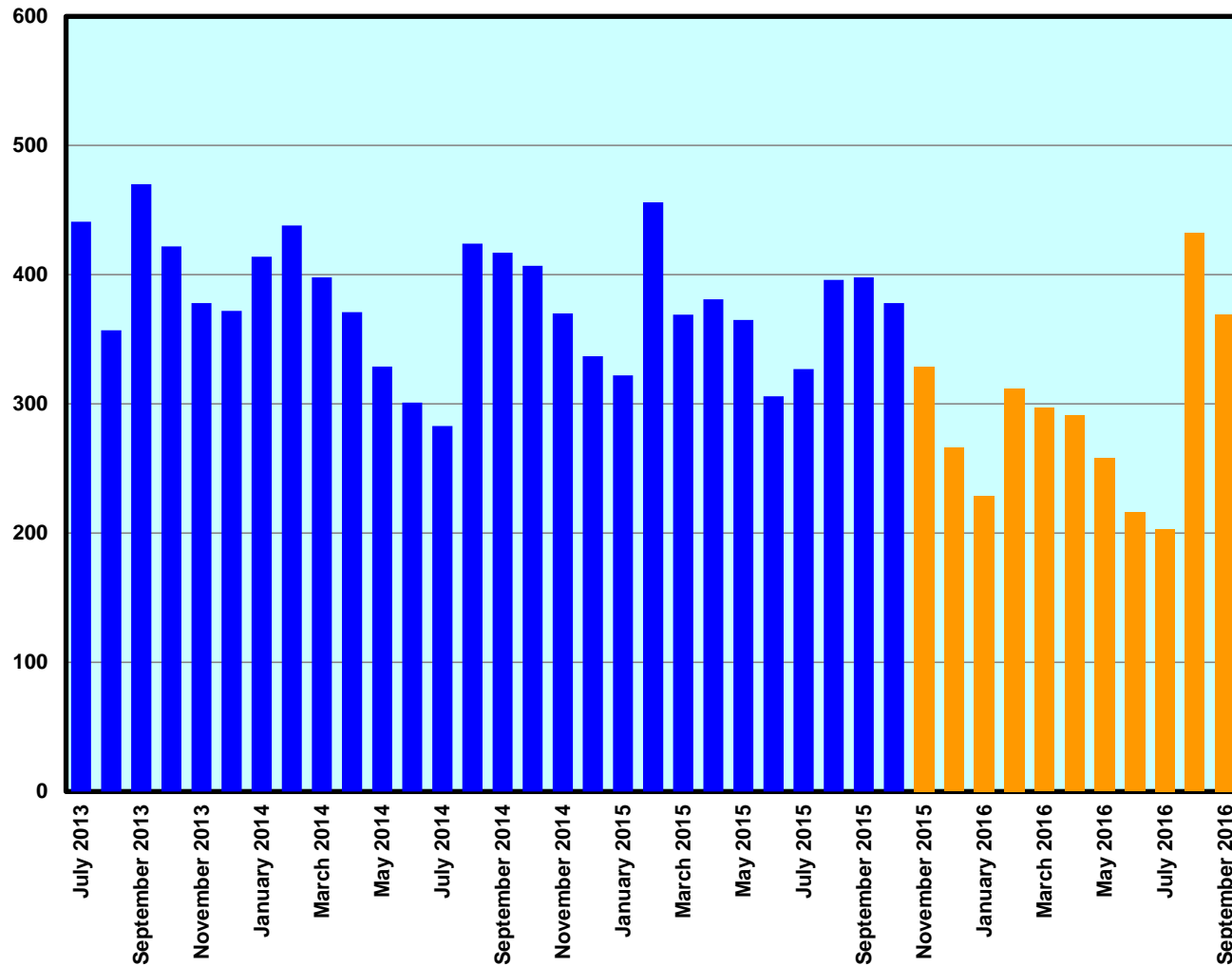
Downtown Trolley at 15-minutes through October 2015,
Then 10-minutes



HISTORIC CAMELBACK



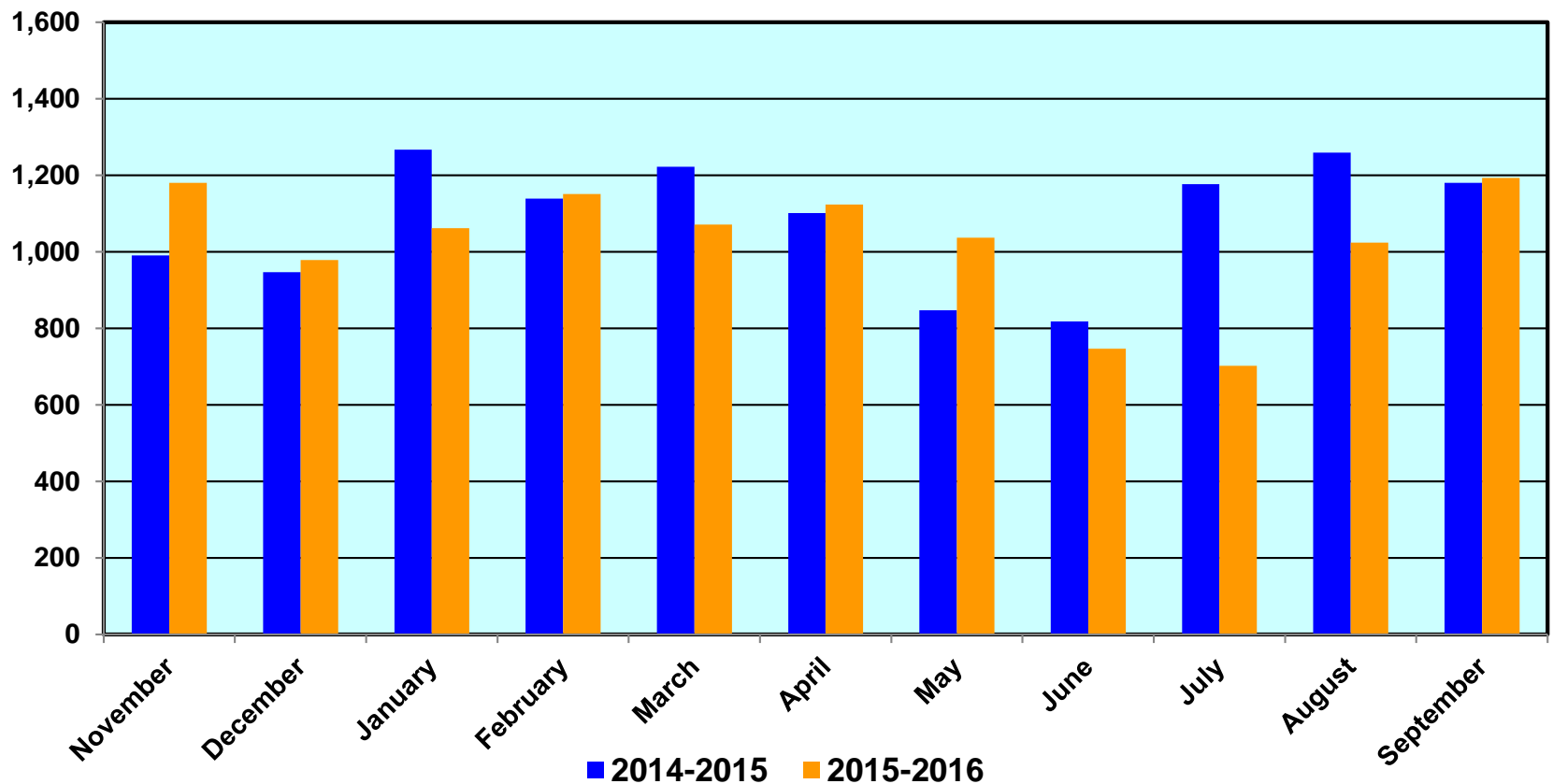
Camelback Route 50 through October 2015,
Then Camelback Trolley



OTHER TROLLEYS



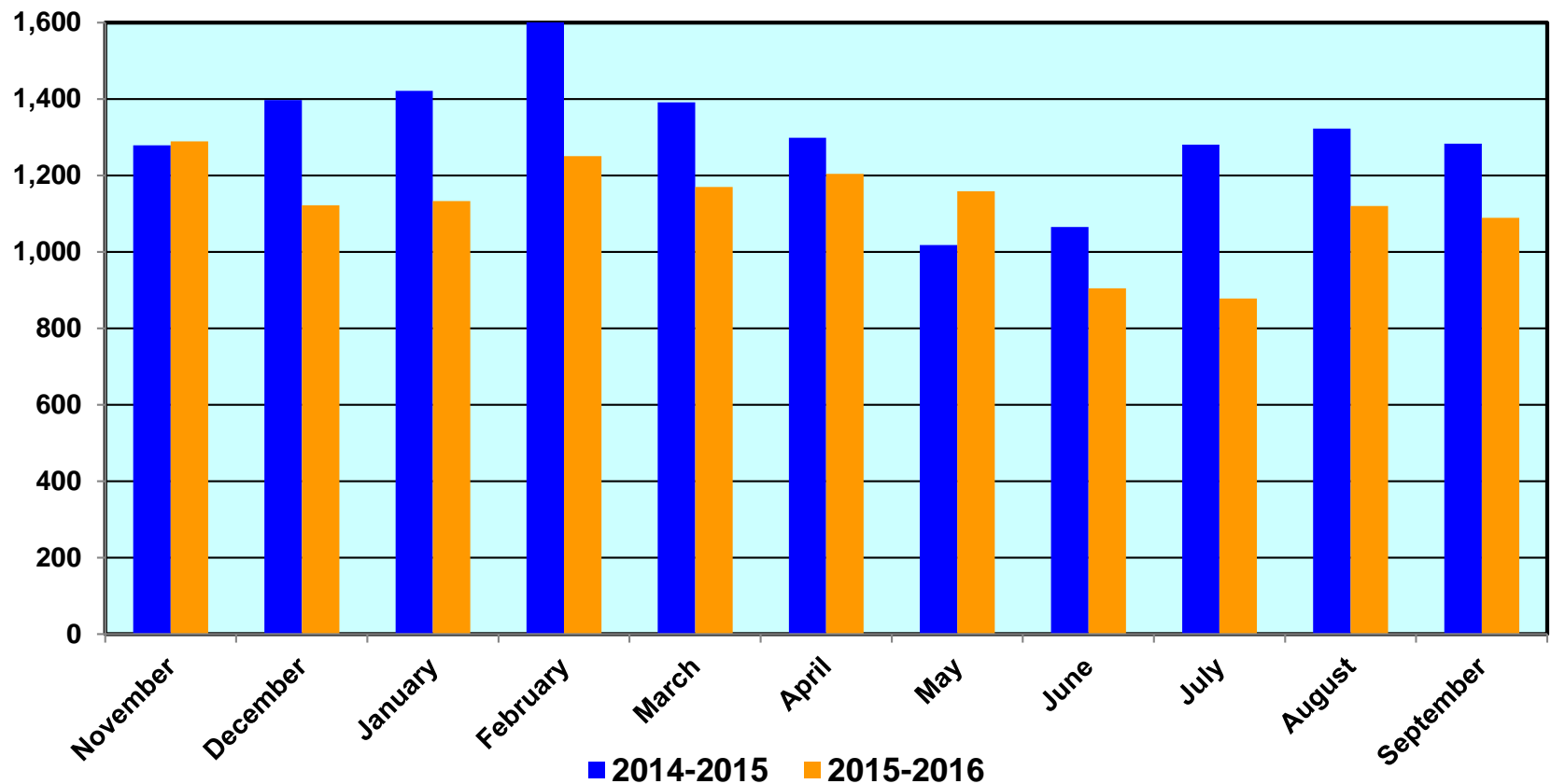
MILLER Trolley Average Weekday Daily Ridership



OTHER TROLLEYS



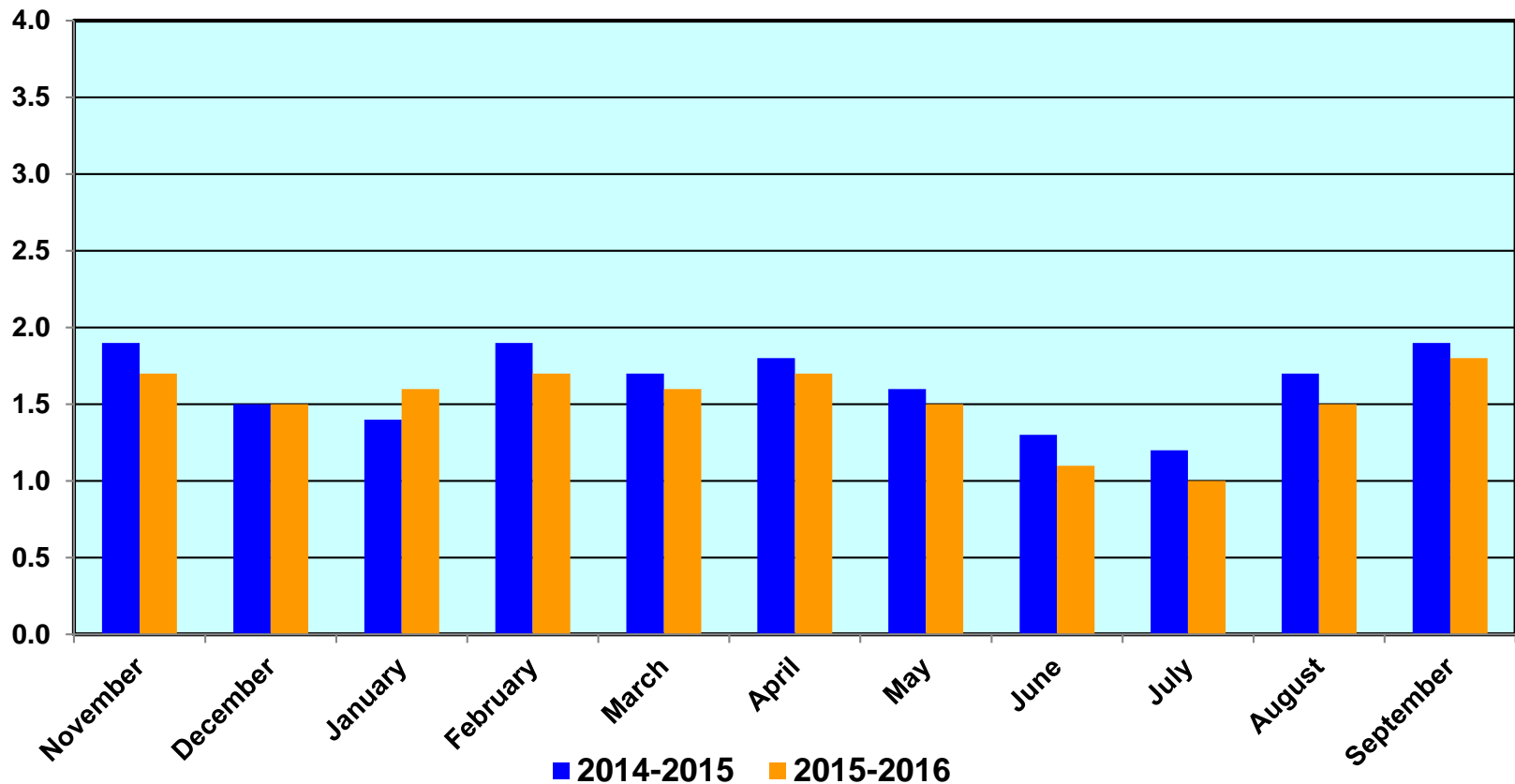
NEIGHBORHOOD Trolley Average Weekday Daily Ridership



OTHER TROLLEYS



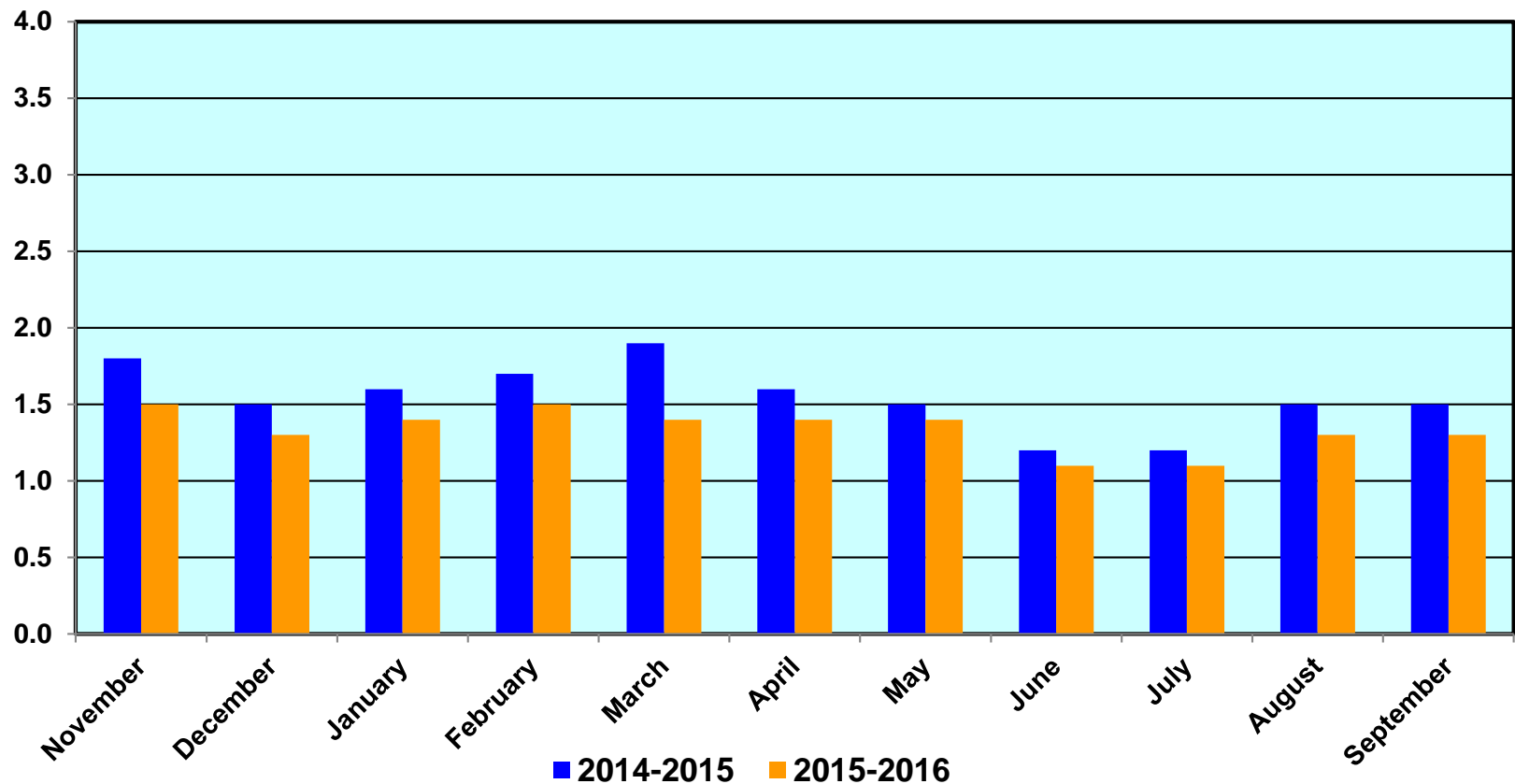
MILLER Trolley Weekday Daily Ridership per Trip per Mile



OTHER TROLLEYS



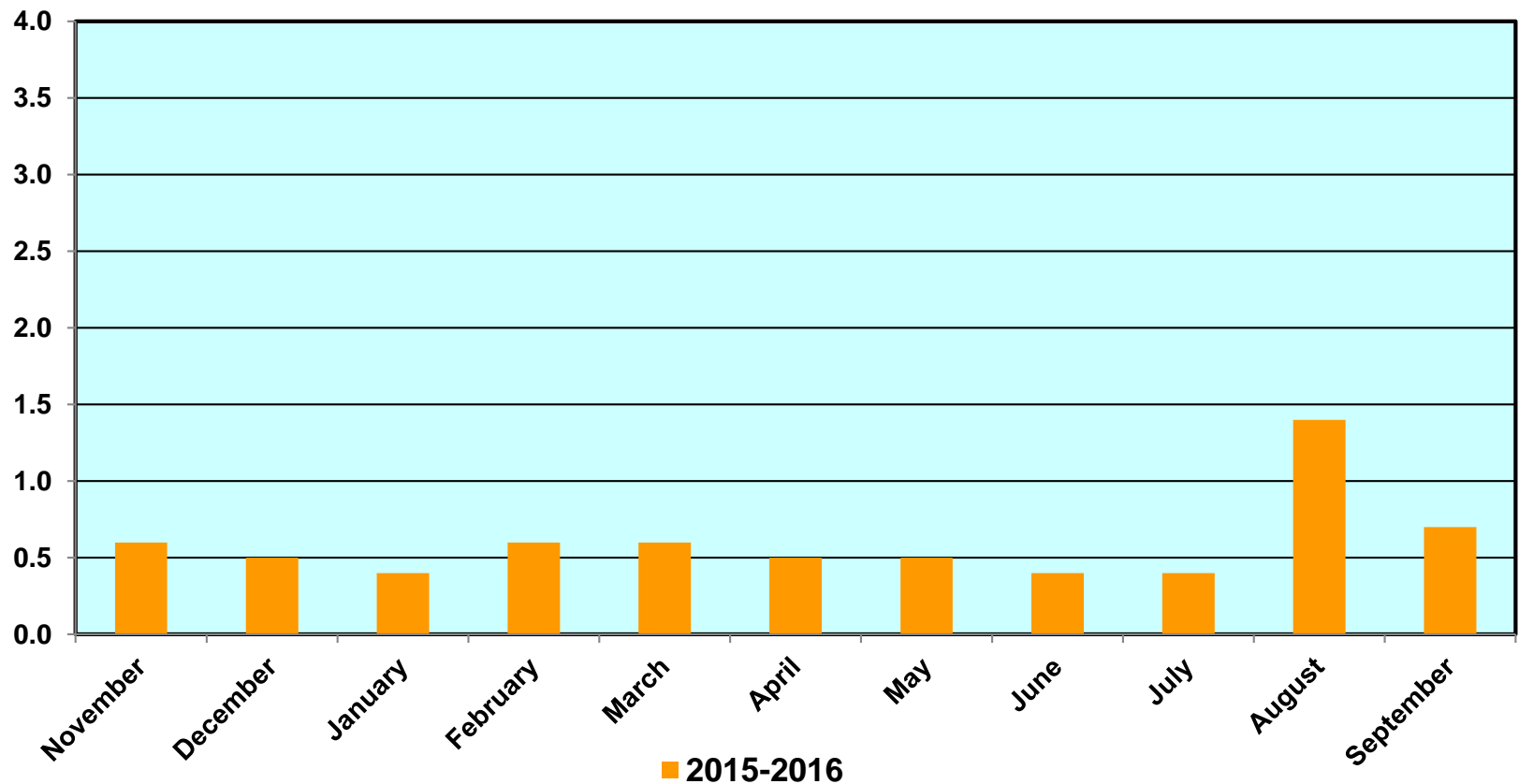
NEIGHBORHOOD Trolley Weekday Daily Ridership per Trip per Mile



OTHER TROLLEYS



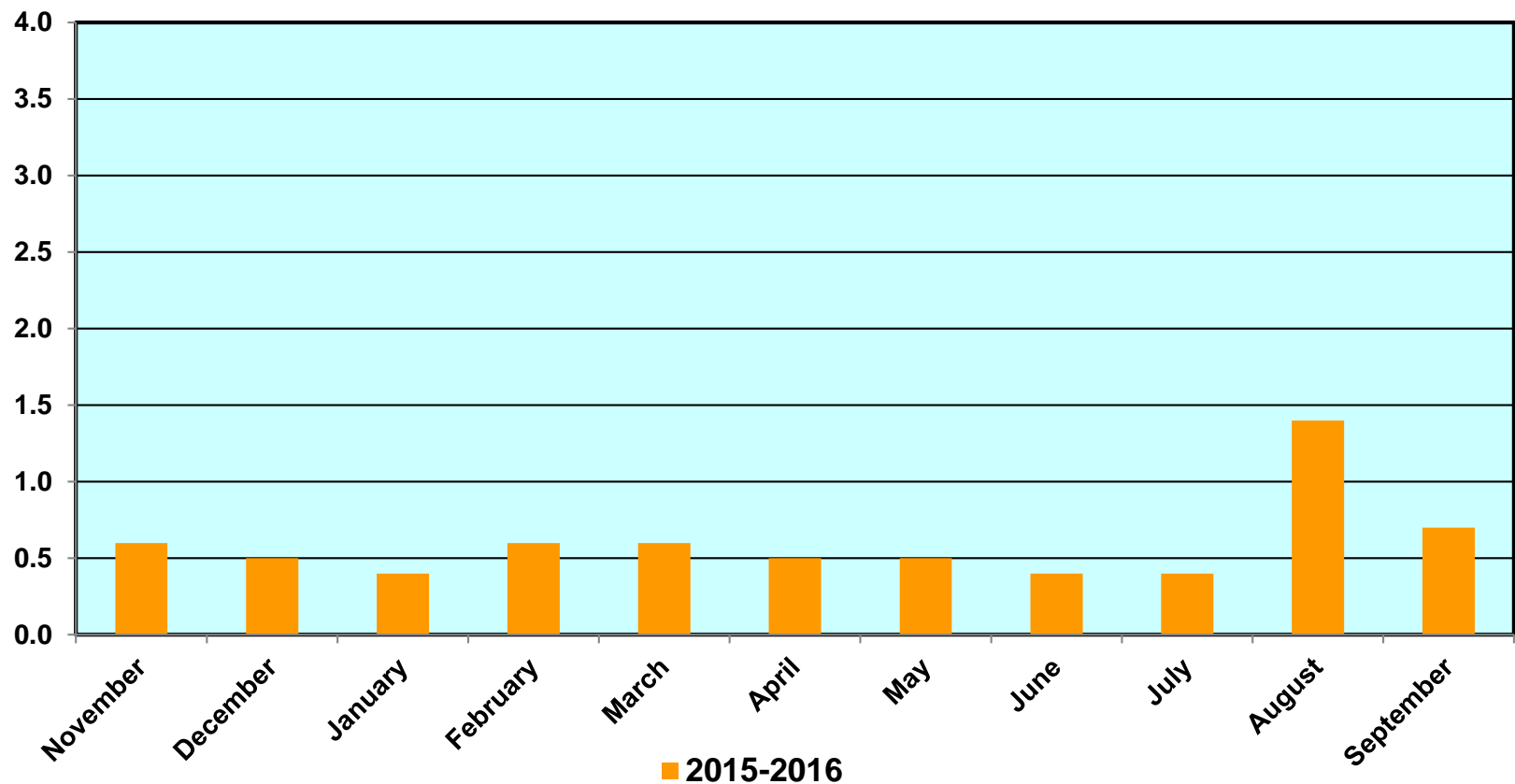
CAMELBACK Trolley Weekday Daily Ridership per Trip per Mile



OTHER TROLLEYS



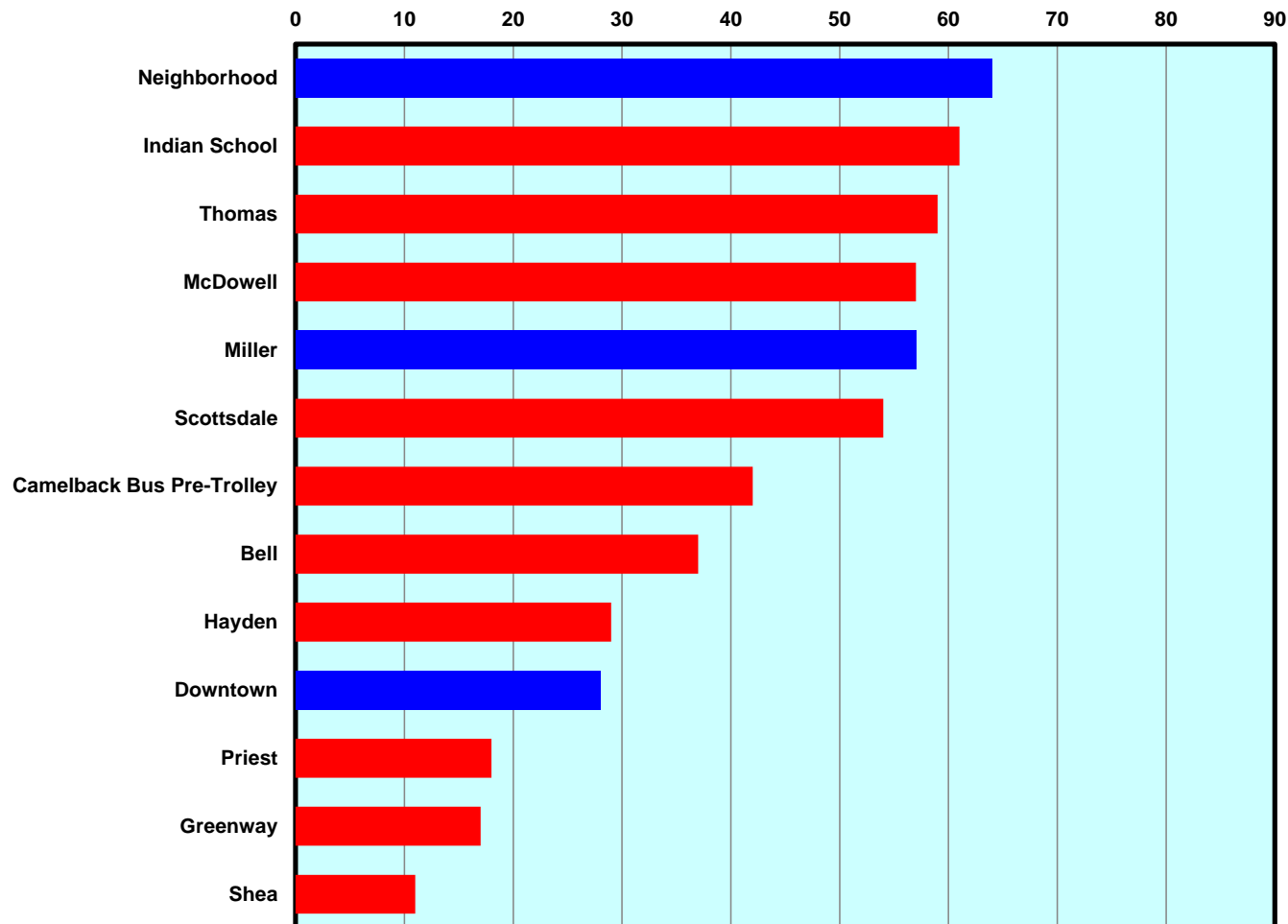
CAMELBACK Trolley Average Weekday Daily Ridership per Mile



ALL SCOTTSDALE TRANSIT ROUTES



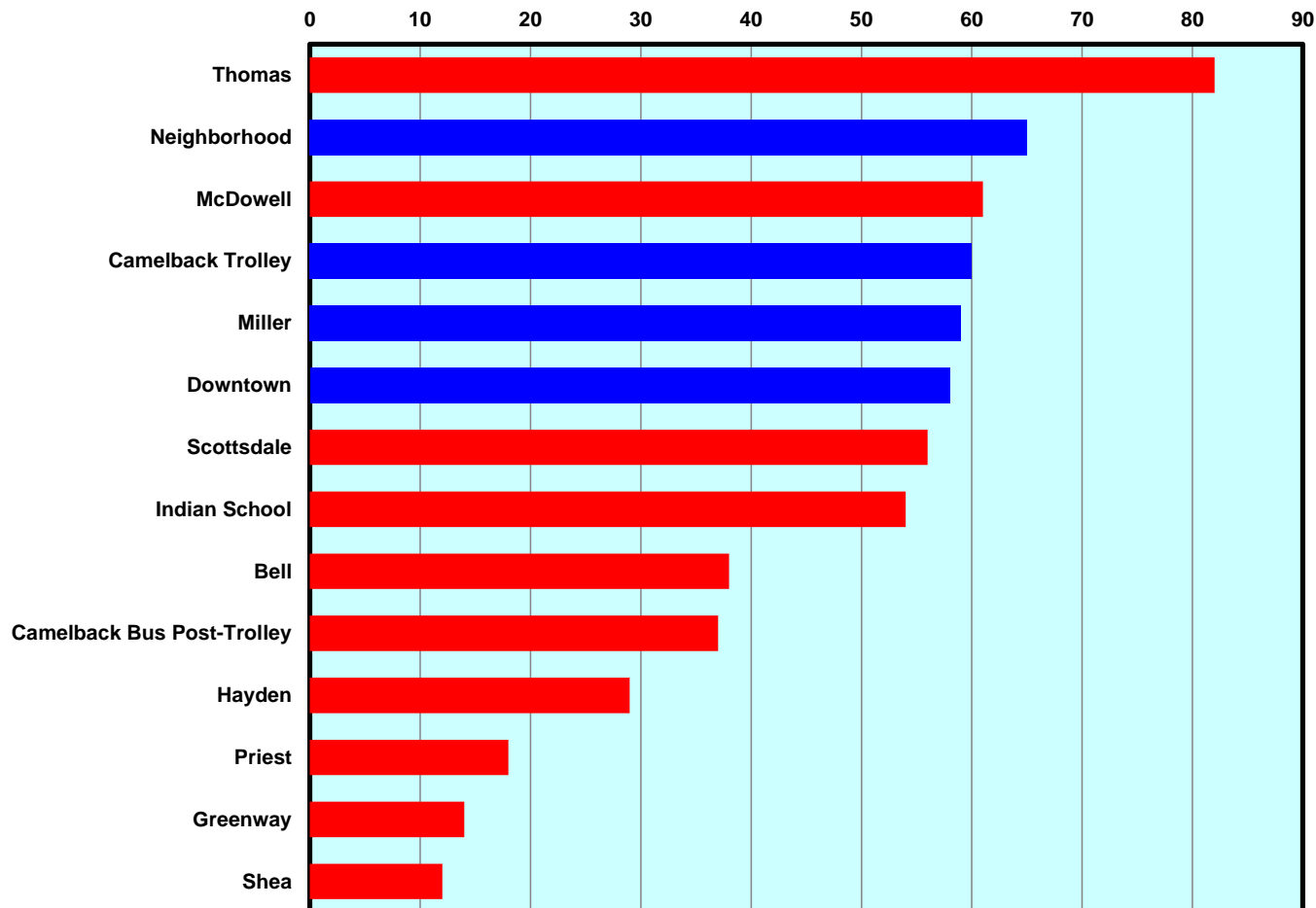
**Average Weekday Daily Boardings per Mile - 2015 Quarter 3
(July to September)**



ALL SCOTTSDALE TRANSIT ROUTES



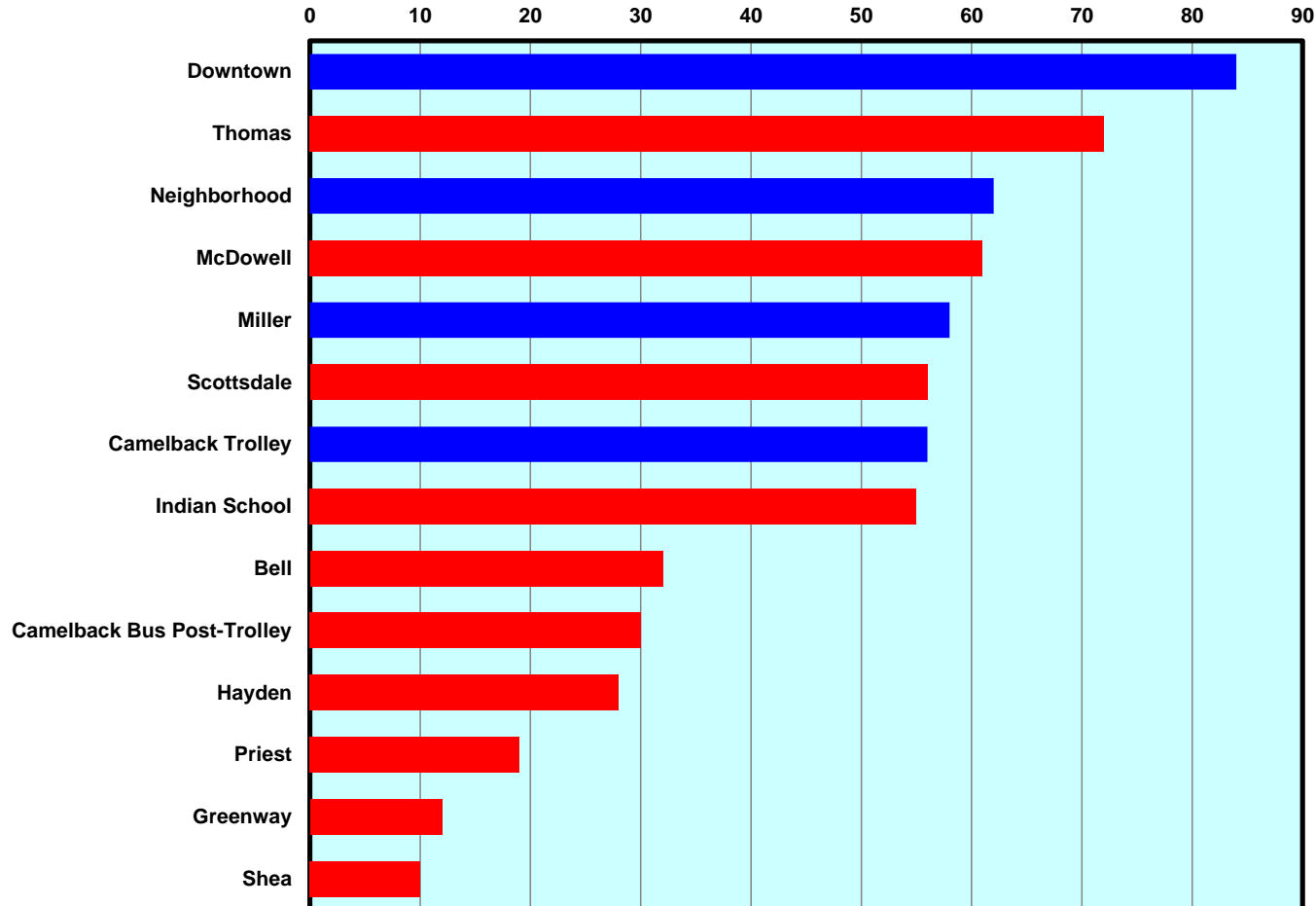
Average Weekday Daily Boardings per Mile - 2015 Quarter 4
(October to December)



ALL SCOTTSDALE TRANSIT ROUTES



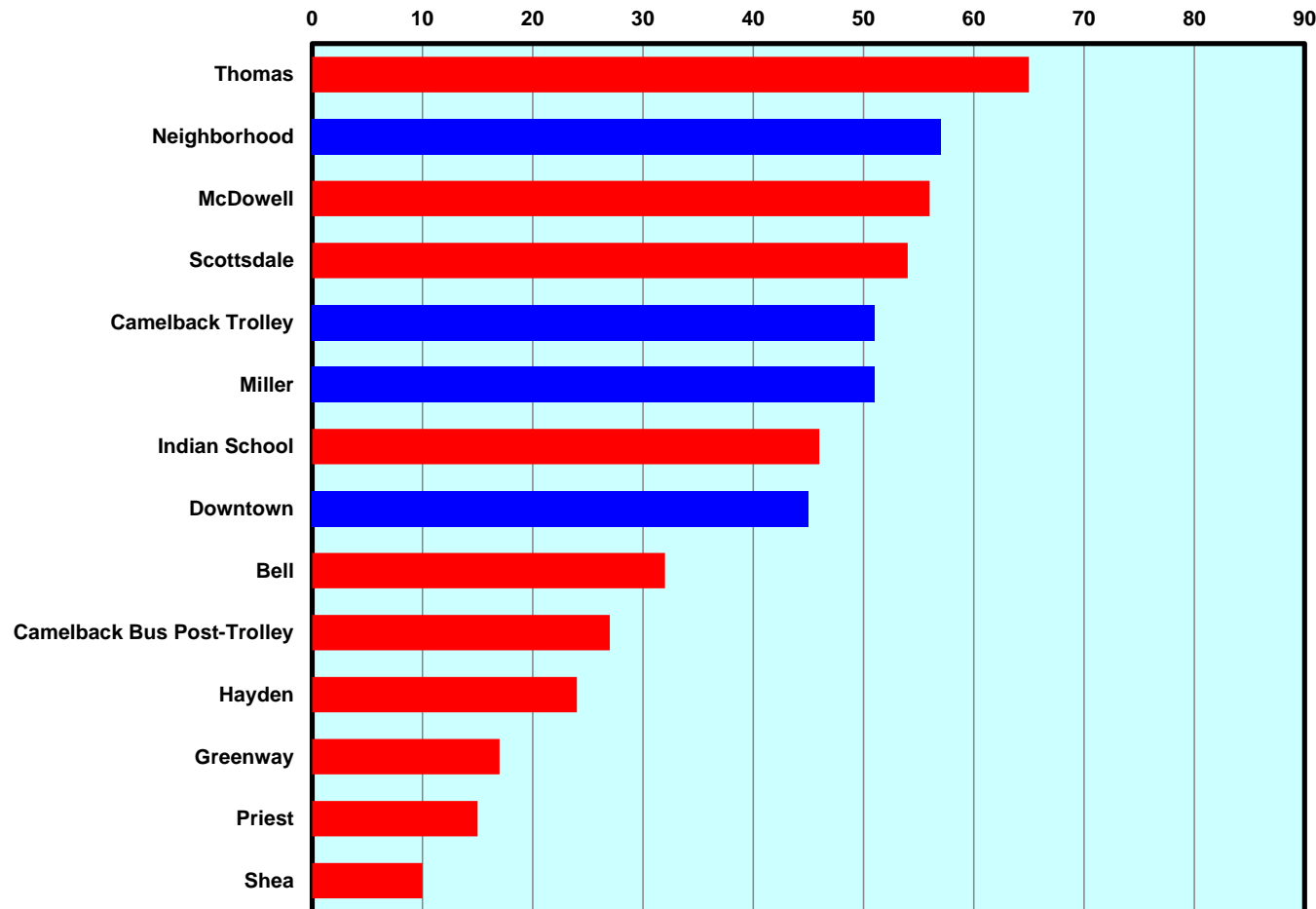
Average Weekday Daily Boardings per Mile - 2016 Quarter 1
(January to March)



ALL SCOTTSDALE TRANSIT ROUTES



**Average Weekday Daily Boardings per Mile - 2016 Quarter 2
(April to June)**



ALL SCOTTSDALE TRANSIT ROUTES



**Average Weekday Daily Boardings per Mile - 2016 Quarter 3
(July to September)**

